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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In Re New Patent Application:

Attorney Docket No.: 24623-001 REG US

Inventors: Rex J Crookshanks

Filing Date: filed herewith on June 5, 2000

Title: Building Construction Bid and Contract Management System, Internet-based Method and Computer Programs Therefor

Certification under 37 CFR 1.10

Mailing Date: June 5, 2000

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I hereby certify that the application/correspondence attached hereto is being deposited with the United States Postal Service "Express Mail Post Office to Addressee" under the above Label Number under 37 CFR 1.10, on the above stated date addressed to: Assistant Commissioner for Patents, Washington, D.C. 20231.

Name: Jacques M. Dulin

Signature: Jacques M. Dulin

Box PATENT APPLICATION

Assistant Commissioner for Patents
Washington, D.C. 20231

NEW PATENT APPLICATION TRANSMITTAL LETTER

Sir:

Transmitted herewith for filing is the above-entitled Regular Patent Application, including the following papers, correspondence and related instructions, as indicated:

- [X] Application (76 pages total), including:
 Specification (37 pages)
 Claims (6 pages)
 Abstract (1 page)
 Appendix (13 pages)
- [X] Drawings (19 sheets, including Figs. 1 - 23);
 drawings are: [X] Informal (Fig 23); [X] Formal (Figs. 1-22)
- [X] Combined Declaration and Power of Attorney
 [] The enclosed Declaration has been executed by all of the inventors.
 [X] The enclosed Declaration has not been executed by all of the inventors. A fully executed Declaration with surcharge will be submitted with a 1533 Notice Response.
- [X] Small Entity Statement of Inventor; copy enclosed from priority application 60/174,989 filed January 7, 2000; the status remains the same for this filing.
- [] Small Entity Statement of Small Business Concern
- [] Information Disclosure Statement
- [] Assignment of Inventors
- [] Assignment Recordation Cover Sheet
- [X] Check No. 30072 for filing fees in the amount of \$449
- [X] Return postcard

1C526 U.S. PTO
09/588030
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Claim of Priority:

[X] Applicant claims priority under 35 U.S.C. §§ 119(a), 119(e) and §365(b) of the following US Provisional and foreign Applications:

Application No 60/137,576, filed June 4, 1999; Application No 60/163,702, filed November 5, 1999; Application No 60/174,989, filed January 7, 2000; Application No 60/197,907 filed April 13, 2000.

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Fee Payment and Deposit Account Authorization

Applicant is a [X] Small Entity [] Large entity. The required fee is calculated below:

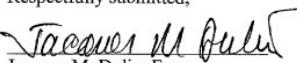
Basic Filing Fee (\$345/690): .	\$345
Total claims: <u>20</u> -20 = <u>0</u> (@ \$9/18 each)	N.A.
Independent claims: <u>4</u> -3 = <u>1</u> (@ \$39/78 each)	<u>39</u>
Multiple Dependency Fee: <u>0</u> (@ \$130/260 each)	0
Surcharge for late Declaration or filing fee (\$65/130)	<u>65</u>
<u>Recordation of Assignment:</u> (@ \$40 each application)	0
TOTAL FEE DUE:	<u>\$ 449</u>

- [X] **The filing fee is being paid by the enclosed check # 30072 in the amount of \$449.**
- [X] Please charge Deposit Account No 04-1699 for any additional fees or credit any overpayments to that account. A duplicate copy of this sheet is enclosed.
- [] The filing fee will be paid timely in response to a 1533 Notice of Missing Parts.
- [X] The filing fee and surcharge under 37 CFR 1.16, patent application processing fees under 37 CFR 1.17 and patent issue fees under 37 CFR 1.18 are intended to be paid by our firm as they arise. As no abandonment is intended by any inadvertent nonpayment of fees, the Commissioner is hereby authorized to charge payment of such fees as from time to time come due, if not paid prior to due date to our Deposit Account No. 04-1699.

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Respectfully submitted,


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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Applicant or Patentee: Rex J. Crookshanks

Serial or Patent No.: 60/174,989

Attorney Docket No.: 24623-0002

Filed or Issued: January 7, 2000

For: **HIERARCHICAL CONTEXT-SENSITIVE QUERY/RESPONSE CASCADE FOR INFORMATION ACCESS SYSTEM WITH USER-SELECTED QUERY SUBSET**

VERIFIED STATEMENT (DECLARATION) CLAIMING SMALL ENTITY STATUS (37 CFR 1.9(F) AND 1.27(B) - INDEPENDENT INVENTOR

As a below named inventor, I hereby declare that I qualify as an independent inventor as defined in 37 CFR 1.9(c) for purposes of paying reduced fees under section 41(a) and (b) of Title 35, United States Code, to the Patent and Trademark Office with regard to the invention entitled

- the specification filed January 7, 2000.
 application serial no. _____
 patent no. _____, issued _____.

I have not assigned, granted, conveyed or licensed and am under no obligation under contract or law to assign, grant, convey or license, any rights in the invention to any person who could not be classified as an independent inventor under 37 CFR 1.9(c) if that person had made the invention, or to any concern which would not qualify as a small business concern under 37 CFR 1.9(d) or a nonprofit organization under 37 CFR 1.9(e).

Each person, concern or organization to which I have assigned, granted, conveyed, or licensed or am under an obligation under contract or law to assign, grant, convey, or license any rights in the invention is listed below.

- no such person, concern, or organization
 persons, concerns or organizations listed below*

*NOTE: Separate verified statements are required from each named person, concern or organization having rights to the invention averting to the status as small entities. (37 CFR 1.27)

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INDIVIDUAL SMALL BUSINESS CONCERN NONPROFIT ORGANIZATION

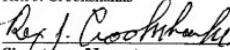
I acknowledge the duty to file, in this application or patent, notification of any change in status resulting in loss of entitlement to small entity status prior to paying, or at the time of paying, the earliest of the issue fee or any maintenance fee due after the date on which status as a small entity is no longer appropriate. (37 CFR 1.28(b)).

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the application, any application any patent issuing thereon, on any patent which this verified statement is directed.

Rex J. Crookshanks

Name Of Inventor

Name Of Inventor


Signature of Inventor

Signature of Inventor

Signature of Inventor


March 10, 2000

Date

Date

Date

**BUILDING CONSTRUCTION BID AND CONTRACT MANAGEMENT SYSTEM,
INTERNET-BASED METHOD AND COMPUTER PROGRAM THEREFOR**

Inventor: Rex J. CROOKSHANKS, of Palos Verdes Estates, California.

5

DESCRIPTION

RELATED APPLICATION:

This provisional application is related to, and claims the priority of, the following United States Provisional Patent Applications by the same inventor as the present application:

- 10 Application No. 60/137,576, filed June 4, 1999; Application No. 60/163,702, filed November 5, 1999; Application No. 60/174,989, filed January 7, 2000, and Application 60/197,907 filed April 13, 2000. These prior applications are incorporated herein by reference.

TECHNICAL FIELD:

- 15 The invention relates to computer-assisted construction bidding and contract administration, and in particular to a system and method for topologically subdividing and defining the detail of the scope of work and for inter-linking construction plans and specifications to construction contracts and subcontracts. The system and method employs a system of almost-orthogonal equations which permits increasing the detail specificity of the
20 work scope as the degree of sub-division of the plans increases, thus eliminating errors and uncertainty relating to the performance of construction contracts. The system and method also permits a bi-directional flow of information during the bidding process and construction process so as to enhance the clarity and detail of work description of both the contracts and the plans and specifications, thus permitting more efficient and effective monitoring and
25 management of contract performance. The system of the invention includes a method of Internet-based electronic project management services for developers, owners, contractors and sub-contractors, architects, financial institutions, and related affiliates for the design, construction and financing management of construction projects.

30 **BACKGROUND:**

The construction industry is one of the cornerstones of the US and world economy. For example, in 1997 the construction industry in the US for more than 500 billion dollars of GNP. More than 200 billion dollars are spent on the construction of new dwellings each year.

- 35 A substantial portion of the cost of construction is due to the expenses of cost estimation, the administration of the bidding process, contract and sub-contract management, generating documentation needed for financing, and allowances for contingencies. In addition,

major cost increments are frequently experienced due to errors in cost estimation, mistakes in bidding, and in dispute resolution with respect to contract obligations, performance responsibility and change orders. Indeed, it can be said that major cost overruns are more typical than not. It has been estimated that such contingencies and problems add 30% or more
5 to the overall cost of the work, and resultant schedule delays cause further consequential losses. Given the enormous size of this sector of the economy, the cumulative inefficiencies, errors and uncertainties in the construction bidding process and in the administration of construction contracts represent a very important source of lost economic value to society.

A particular problem in the traditional approach to construction contract bidding, cost
10 estimation, and management of contingencies stems from the inability to sufficiently detail the work description. In the existing approach to bidding, the plans and specifications are circulated with a description of the work to be bid to the respective subcontractors to price a portion of the work. Each subcontractor then estimates labor, material and administrative costs and profit based on the scope of work required. Each subcontractor's estimation of the scope
15 of work is influenced by the subcontractor's own interpretation of the plans and specifications, and is based also on each subcontractor's assumptions as to the respective performance responsibilities of the general contractor and the many other subcontractors. Mistakes and inconsistencies of interpretation of the plans and the scope of each bid are difficult, if not impossible, to avoid in traditional bidding.

20 Experience has taught contractors and subcontractors to add very substantial allowances to the bid price for the resulting contingencies, uncertainty, delays and dispute resolution costs. Likewise, owners and lenders of necessity also must allow for these contingencies and uncertainties, increasing the cost of capital and loan administration. In addition, the traditional bidding process does not provide an effective opportunity to correct errors, omissions and
25 ambiguities in the plans and specifications prior to submission of the bids and awarding of contracts. Further, and of increasing significance, is the slow, by-hand and by-phone process of exchange of bid and contract management documentation and information.

These problems are manifest in spite of architect-prepared plans and sound engineering practice. Even where computer assisted design ("CAD") drawing and specification systems are
30 employed, experience shows that there remains real uncertainty as to *exactly what* aspects of the project work are the responsibility of *which* subcontractor, and *exactly how* much labor and *exactly what* materials will be required for *which* subcontractor's performance. Likewise, portions of the scope of work which are inadvertently excluded from the subcontracting bids create additional contingencies and uncertainties for the general contractor, and controversies,

often expensive and protracted, sorting out responsibility and liability for work and payment of costs.

If each bidding contractor and subcontractor could know that the work bid could be completed at a given bid price, there would be little need for contingency bidding. Likewise,
5 an accurate and completely detailed description of the work being bid or constructed would assist in preventing or quickly resolving disputes concerning contract obligations and performance.

If information generated during the bidding process could be interactively channeled back and forth between the general contractors, architects and owners before the finalization of
10 the contracts, many mistakes and ambiguities in the plans and specifications could be corrected in time, e.g., prior to contract let, to avoid change orders and disputes. When post-contract changes to the plans or specification are required due to circumstances which are unforeseeable at the time of bidding, a completely detailed description of the change of scope of work, and of of
15 the extent of needed modification of the general contract and each subcontract would allow such change orders to be managed quickly and fairly.

What is needed, and is not present in the prior art, is an interactive, computerized system and method, preferably communication enabled via the Internet, LANs or WANs, for controlling the construction bidding and contracting process to provide a certain and complete description of the scope of work required under each contract and subcontract so as to avoid
20 inconsistencies, omissions, ambiguities and mistakes in the interpretation of plans and specifications, and for the ongoing management of the financing, and construction management phases of the project. What is also needed, and not present in the prior art is a means and method for systematically linking the construction plans and specifications to the bid and contract generation process so as to provide an interactive, bi-directional flow of
25 information to increase the accuracy, completeness and clarity of both the contracts and the plans.

SUMMARY-Including Objects and Advantages of the invention:

This present invention provides an interactive, systematic topological approach to
30 solving the problems of the traditional bidding process, and its integration into an Internet-based construction management business. The invention includes a computerized, Internet-based building construction bidding and contract management system and method (herein generally referred to collectively as "Bid System").

The Bid System of the invention establishes a series of "overlays" to the construction
35 plans, in which each overlay corresponds to a different trade or bidding category of work. The

overlay provides a representational "surface", aligned and oriented to the plans, upon which the detail nature of the work to be performed in a particular trade or category may be precisely topologically defined. The work in the overlay category contained in the plans is defined and functionally segregated by establishing selected topological subdivisions or of the overlay
5 corresponding to the locations of the plan elements requiring the particular category of work.

The Bid System further includes linkage of the overlays and defining topological subdivisions to system-generated forms of contracts and subcontracts. By means of this linkage, the scope of work to be bid under the contract is accurately associated or "mapped" to corresponding subdivision regions and overlay category on the architectural drawings or
10 construction plans. In other words, the overlay subdivisions provide a work scope definition which is incorporated by reference to define a specific contract obligation.

The Bid System of the invention permits full, clear and unambiguous definition of the scope of work to be bid under each contract and subcontract. By this means, all the parties involved in the various phases of the project, primarily including but not limited to, the lenders,
15 architects, contractors, sub-contractors and owners (also referenced herein as the "client") know precisely what is required in each sub-contract. The systematic linkage of the construction plans and specifications to the bids and contracts generated by the system permits the early detection and correction of errors, omissions, ambiguities or inconsistencies of the plans, thus providing a bi-directional flow of information to increase the accuracy both the
20 contracts and the plans.

Other objects and advantages will be evident from the description, drawings and claims.

Bid System Principles

From a mathematical perspective, the Bid System and method of the invention, including the set of overlays containing identified regions mapped to specified corresponding
25 regions of the plans and specification on a one-to-one basis, employs a system of almost-orthogonal equations, which provide the following functionality. Any such function which is non-singular, and which has one-to-one mapping point-to-point, has the property that the smaller the surface area of the region (provided the function is continuous on the region), the greater the transparency. Thus, as the area of the region specified is reduced, the degree of
30 precision increases and the potential degree of ambiguity decreases. As the topological subdivisions of the overlays are progressively refined through the operation of the method of the invention, a mathematical limit is approached wherein the potential ambiguity tends to zero. Consequently, the mapping of overlays to plan comprises a system having the property of progressively increasing transparency as the typical size of the subdivisions is reduced.

Thus, under the system and method of the invention, the size and boundary location of each subdivision may be selected to obtain the degree of specificity needed to *completely* identify and define the scope of work for any given element of the project work. Accordingly, it is possible to use the Bid System of the invention to identify, *without ambiguity*, the entirety 5 of the scope of work called out in the plans and specification. In other words, it is possible to use the Bid System to specify 100% of the scope of work of the project, not just 99.9%. In practical terms, this means that the Bid System may be readily adapted to any specialty work or category of services or components of the construction project, both routine and non-routine in nature, and still obtain complete specificity of the scope of work required under any 10 subcontract.

The method of the invention is preferably carried out by means of a computer-based digital Bid System including a conventional computer system (with conventional processors, memory, input/output and display devices) which is suitably programmed to carry out the present inventive method. However, the functional steps of the method of the Bid System of 15 the invention may also be carried out by a combination of manual and computer operations.

The following description will focus on application of the method to sub-contractor bidding, it being understood that the steps may also be carried out with respect to the various other project phases and requirements, including financing, permitting, management of the project during construction, and indeed, to the initial conceptual design phase.

20 **Plans, Drawings and Specifications**

The Bid System is compatible with conventional architectural, engineering and construction plans, drawings and specifications currently used in construction projects. The Bid System is also compatible with conventional CAD systems, and the system includes means for file import, export and conversion. The primary input to the Bid System is preferably a 25 complete set of conventional architectural or construction drawings, preferably including any engineering notes, bills of materials; custom features, items or designs, or other specifications provided with the drawings (these documents may be referred to collectively herein as the “drawings”, “plans” or “plans and specifications”).

The plans may be scanned in from paper sheets by a conventional digitizing scanner so 30 as to create a computer-readable digital data file. The term “plan sheets” may be used to denote herein either the paper or electronic image form of the drawings, as the context indicates. Alternatively the plans may be imported (and converted as needed) from conventional computer-readable CAD or other electronic files. Optionally, the Bid System may include a CAD module to allow the preparation, editing, correction and revision of 35 drawings directly without additional distinct import/export/scanning operations. Regardless of

the means of input, the term "plans" or "drawings" will be used herein to denote the computer-readable form of the plans or drawings, unless another meaning is indicated by the context (for example, plans and contracts printed as "hard copy").

Plan Overlays

5 Following input of the plans, a categorical series of virtual overlays are created as digital data for each plan sheet. Preferably, the overlay series is stored as one or more digital file(s) in computer readable medium. Each individual overlay is geometrically coordinated with and associated with a specific sheet of the plans. Each virtual overlay represents a particular category of building trade or bidding sub-contract category.

10 In essence, the overlay is a virtual surface, aligned coordinate with the plans, upon which plan specification information pertaining to a specific trade or bid category may be defined, extracted or refined, distinct from other plan information, for example, by enclosing pertinent plan features in closed boundaries (which can be referred to as "frames"). Thus the overlay is a representational object for segregating plan information related to a particular trade category.

15 The digital or virtual overlays are analogous to transparent sheets which can be superimposed on paper drawing sheets, so that subdivisions may be drawn on the overlays to mark data or drawing features mapped to specific regions or locations on the plans. For simplicity and clarity, this physical "transparency and paper" analogy will frequently be used
20 herein to describe certain steps of the method of the invention. However, it is noted that, unless the context indicates otherwise, the steps are preferably carried out electronically using software embodiments of the Bid System invention, conventional computer means, and conventional peripheral devices, such as displays, mouse type devices, light pens, keyboards and the like, to establish pertinent information in the form of computer-readable data. The
25 plans and overlays are preferably transmitted electronically in the Internet-based business method aspects of the invention.

The term "trade", as used herein with respect to the plan overlays and the corresponding bid categories, includes traditional building and construction trade categories. The term "trade" in this context can also include any other category of work, services or materials indicated by, or
30 related to, the plans and specifications which the bid system operator, general contractor, architect, lender, insurer, permitting or inspecting the agency, or owner determines is advantageously assigned to a distinct work or bidding category. This can include work to be reserved to the owner or postponed to future projects. As many different categories may be established by the operator as are needed to completely bid the project.

35 Establishment of Overlay Subdivisions

The topological subdivision regions which refine and define the scope of work are created upon the overlays by a number of exemplary method embodiments of the invention. Regardless of the particular method or methods used to establish the overlay subdivision, each subdivision is preferably identified by a unique code and preferably also has a displayable icon

- 5 associated with it. The identification code and icon ("identifiers") provide a cross-reference between the contracts and bid documents which list/display such identifiers and the overlay subdivisions which define the work to be performed.

Where a particular plan element spans more than one subdivision within an overlay (i.e., boundary-piercing elements), each such subdivision may have associated annotations

- 10 defining the continuation of such element to adjacent subdivisions,

In both computer display and in printed hardcopy, the overlay subdivisions may be shown as a highlighted or shaded region, and displayed or printed superimposed upon the plans. In its computer displayed form, each such subdivision may be "clickable" so that a mouse or other input device can trigger the display of associated information relating to the

- 15 subdivision, such as defining coordinates, annotations, and cross-referenced contract and bid documents as described further below. Preferably the user may click to open a menu of such options, and select the desired display options.

Overlay categories may be color or pattern coded for printing and computer display, to permit convenient viewing of more than one overlay category superimposed on the plan sheet

- 20 simultaneously.

Overlay Box Subdivision Embodiment

In one embodiment of the Bid System of the invention, the work described in the plans is defined by the establishment, on each relevant overlay, of a system of subdivision regions, each of which is enclosed by a user-defined closed boundary, frame, or "box", so that each

- 25 such box identifies, delimits and locates on the plans a portion of the project work to be performed. Each such enclosed region or box includes within its closed boundary a finite portion of the scope of work to be bid under the particular trade contract, i.e., that enclosed work portion is accurately associated or "mapped" to the corresponding boxed regions and overlay category on the architectural drawings or construction plans. Thus, the "box" work

- 30 scope definition is incorporated by reference to define a specific contract obligation.

The Bid System user or operator draws or defines "boxes" on each overlay, over each part of the respective plan sheet which corresponds to the particular subcontract category for the overlay. Each box is preferably defined by a plurality of ordered pairs of coordinates, and by lines connecting these coordinate pairs to form a closed box perimeter or boundary. The

- 35 coordinate system may be centered with respect to any convenient reference point on the plan

sheet, and preferably is based on a conventional rectangular coordinate grid, but other conventional coordinate systems such as radial coordinates may also be used. The boxes are not limited to any particular shape and the lines connecting the coordinate pairs are not limited to straight lines, and may be other geometrically defined curves.

- 5 However, as the term "boxes" implies, boxes composed of a plurality of straight lines defined with respect to an orthogonal coordinate system are generally preferred for simplicity, operator convenience, and consistency with conventional building plans. The scale of the coordinate system may be in arbitrary units, or may adopt the scale and units of the plans. Reference grid scales may be superimposed on the borders of the overlay for viewer
10 convenience, in the manner of conventional street map coordinate grids.

- The Bid System may optionally be applied to 3-dimensional box definitions, and the grid system can include 3-dimensional coordinates, preferably as ordered orthogonal triplets (although spherical coordinates may be used). However, since the conventional plans used in construction are generally organized as 2-dimensional representations, the 2-dimensional
15 embodiment of the Bid System is described in detail herein.

- It is preferred that the region defined by a given box of a category not overlap with another box of the same category, such as a box-within-a box. While the overlap does not prevent the job from being bid properly as long as duplication is avoided, it is desirable to have each box within a category uniquely define a plan region, so that completeness and non-duplication can be proven topologically.
20

- Note that the operator may also preferably draw boxes over any part of a plan sheet not having work covered by the particular overlay category, and these non-category boxes ("empty boxes") may have no icon or be assigned an icon indicating the absence of work associated with a category. Optionally, an error detection algorithm may be included to check to ensure
25 no portion of the plans was inadvertently neglected by the operator, i.e. was not boxed. There may also be boxes defined by subtraction, i.e., a larger region minus one or more small boxes within or encroaching into portions of it. The foregoing procedure is preferably then repeated for the work category with respect to each sheet of the plans, and repeated with respect to each designated work category. Thus, preferably each sub-contract category will have an overlay
30 with boxes for each plan sheet, and corresponding icons assigned by the bid engineer.

- Once the boxes are created on each overlay sheet corresponding to a particular category, a form of contract or sub-contractor bidding agreement may then be read in from a contract forms database. Alternatively, a suitable contract form may be scanned in or imported into the Bid System. The Bid System preferably includes conventional word-processing and/or
35 image processing software modules to permit the creation of custom contract forms or the

editing of contract forms submitted by a particular owner or vendor. The contracts forms includes paragraphs or sections in which the detailed scope of work required is described with reference to the boxes.

- The subdivision of the plans into overlays and boxes in the Bid System is particularly
- 5 advantageous in situations where work in a given trade category is to be divided between more than one entity, which ordinarily exacerbates the risk of confusion using traditional bidding procedures. This may occur, for example, where the general contractor and a subcontractor divide a particular category of work, or if owner-supplied fixtures etc. are to be installed by a subcontractor. In these circumstances, the specifically bid, box-defined work portions serve to
- 10 avoid misunderstanding as to the limits of the role of each party. Also, boxes and/or distinct overlay categories may be established to distinguish and define non-contract work or materials which are specified in the plans. Examples are work to be completed by the owner (detailed as an "owner-work" boxes), or work to omitted form the initial phase of construction (detailed as an "postponed improvement" boxes).

15 **Alternative Exemplary Overlay Subdivision Embodiments**

In addition to the overlay box subdivision embodiment, the topological overlay subdivisions which refine and define the scope of work may be created upon the overlays by a number of alternative exemplary method embodiments of the invention, described below.

- Like the overlay box subdivision embodiment, each of these alternative embodiments
- 20 establish in the overlay a subdivision and/or segregation of the plan information related to a bid category so as to permit linking to contracts, bids and other documents, but each includes alternative subdivision methodology. The various overlay subdivision embodiments described herein may be used alone or in combination with each other.

Object Trace Subdivision Embodiment

- 25 In an alternative embodiment of the Bid System of the invention, the work described in the plans is defined by the establishment, on each relevant overlay, of a system of trace paths covering plan elements pertinent to the corresponding trade or category. Each trace path defines a contiguous surface region of the overlay (and corresponding aligned plan sheet). Each overlay may have as many trace paths as are necessary to completely define the bid
- 30 category work. Each trace path is thus a representational object on the overlay corresponding in extent and general shape to the plan element or elements.

Each trace path includes a trace centerline, which may include both straight and curved portions. The trace centerline may also be branched. The trace path also includes overlay/plan area within a pre-defined distance perpendicular to the trace centerline (trace breadth). The

trace path is thus represented geometrically in the plan ordinate system by a series of contiguous line and curve segments, intersection points and trace breadth parameter.

The trace paths are preferably created by moving a pointing device (such as a mouse cursor, input stylus or other conventional computer user input device) over a display of the

- 5 digitized plan sheet, so as to establish in computer memory a geometrically defined curve. The trace path method of overlay subdivision is particularly suitable for distributed kinds of plan or trade elements, such as ducting, plumbing, wiring conduits and the like. The trace path can be established quickly and intuitively for such elements. In both computer display and in printed hardcopy, the trace path may be shown as a highlighted or shaded region.

10 **Zoom View Subdivision Embodiment**

In an alternative embodiment of the Bid System of the invention, the work described in the plans is defined by the establishment of scaled or "zoom" view definitions upon the overlay. The zoom view subdivisions are similar to the subdivision boxes described above, but are not defined by a particular closed curve, but rather are represented by a center point and a 15 5 geometrically defined area about the center point. For example, a zoom view may be defined as a circular area having a defined radius about the center. Alternatively the zoom view is a rectangular area of predetermined height and width about the center point.

The zoom view subdivisions are conveniently displayed or printed as enlarged views of the original plan sheet, and may be defined or scaled to fit the shape of a page print area or screen. The scale of the enlargement (corresponding to the defined radius or height/width of the zoom view) permits detailed plan information to be conveniently printed/displayed, such that the entire printed/displayed portion falls within the subdivision.

20 **Grid Block Subdivision Embodiment**

In an alternative embodiment of the Bid System of the invention, the work described in the plans is defined by the establishment a comprehensive grid of overlay blocks. The work is then defined by specifying the particular grid blocks which encompass the work to be included in the category. The size of the grid blocks is preferably standardized for all overlays linked to the plan sheet, and the standard size may be preselected to permit a desired degree of selectivity. The grid block identifiers may correspond to row and column headings, such as are 25 15 typically used in maps and spreadsheets.

30 **Functional Overlay Drawing Subdivision Embodiment**

In an alternative embodiment of the Bid System of the invention, the drawing data pertaining to a work category is subdivided by extraction/segregation from the plans and insertion into the corresponding overlay. Thus the overlay, following extraction, comprises a 35 25 functional subdivision drawing including the category work. Since the overlays as defined

herein are representational surfaces coordinately aligned with the drawing sheets, particular drawing information may be extracted or copied to an overlay of that sheet without loss of contextual information. The data on the overlay may be matched or mapped to identical data on the plans. The overlay is linked to contracts, bids and other documents as described herein

5 to define the scope of work of the overlay category.

In the functional drawing subdivision embodiment, as many overlay categories may be established as are needed to extract all work to be performed in the project. In addition, if reserved or non-project plan elements are extracted to an appropriate overlay category, then a summation file of the overlays for a particular plan sheet may be compiled, preferably with

10 both plan sheet and summation in a comparable digital format. A cross correlation or comparison between the summation file and the plan sheet is preferably performed to determine that no element of the plans has been inadvertently overlooked (completeness check functionality).

The extraction of plan data to the overlay is preferably performed by conventional computer user graphical interface tools and devices, such as are conventionally employed in graphics applications. For example, drawing elements may be graphically selected, grouped and copied to a corresponding location and orientation in the overlay. The functional drawing subdivision embodiment is particularly suitable for use in connection with CAD design applications, whereby a computer-readable CAD file is the input form of the architectural plans

15 to the Bid System computer.

The Bid System may be readily adapted by one skilled in the art to recognize and manipulate drawing elements of the CAD plans drawing as defined in any conventional CAD file format. Similarly, where a particular CAD system permits the architectural plan sheets to be compiled as a series of drawing layers, the bid system subdivision process may include

20 selecting one or more layers of the CAD file, importing the layer to the overlay file, and performing additional selection and editing, if needed, to limit the data elements in the overlay to those relevant to the corresponding trade category.

Linkage Of Overlays To Contracts, Bids And Project Documents

The Bid System can generate forms of contract or bids, and update, archive and revise

30 the contracts throughout the various stages of bidding and project work. The terms "contract" and "bid" as used herein refer to such sequential stages or versions of a contract document, even though the legal nature and significance of the document typically changes as the bidding and subcontracting process proceeds. At the outset, the "contract" or "bid" may in fact be simply a non-binding invitation to subcontractors to make offers on the defined portion of the

35 project or work. Later when priced and submitted by the subcontractor, the "contract" or "bid"

may become an offer. Finally when accepted by the general contractor and owner, the "contract" may become a legal obligation to perform work at the bid price. The particular legal nature indicated by the terms "contract" and "bid" is to be interpreted in light of the context and project stage.

- 5 The description of the bid contract generation method herein uses as an example the Box Overlay Subdivision Embodiment described above, but the method applies equally to the alternative overlay subdivision embodiments. The operator links each paragraph or section to the corresponding parts of all the drawings by listing next to each, the appropriate icons on each box of each drawing overlay (assigned in the above paragraph). In the electronic form of
10 these documents, the icons may include hyperlinks for easy viewing and cross-reference between the drawing and corresponding contract portions. The icon may include a distinctive and easily recognizable logo or symbol in combination with box reference codes which is easy to distinguish from conventional architectural elements and notations of the plans. If desired, different icon logos or symbols may selected to be indicative of a particular category or trade
15 of the box.

The complete subcontract with icons, the drawings, and the overlays can then be printed out for review by the client and/or architect, and any necessary corrections made by the operator using the Bid System. In general, the printed form of both plans and contracts will be referred to herein as "hard copy". Any non-category or empty boxes can also be identified in
20 the print out so that the architect and client may ensure that those areas were not simply missed by them in drawing up the contract. The process is repeated for each subcontract category.

- These sub-contracts can then be printed with the drawings and overlays (the overlays may be printed on transparencies, or directly superimposed on the plan printout). In this manner, all parties can readily inspect the sub-contracts and determine exactly what is required
25 (from looking at the same icons which appear on both the contracts and overlays). Sub-contractors can enter a price on these sub-contracts and initial or digitally sign each page, to complete a bid. The signed (or initialed) sub-contracts are saved into the system for archival purposes.

- Note that the entire contract with all subcontracts, icons, and drawings and iconized
30 overlays, can also be provided to the client (for example on a CD-ROM, or by modem download) with icons being hyperlinked for easy jumping between an overlay box on a drawing sheet, and a corresponding paragraph or section of the contract.

Change Orders And Plan Modifications

- The Bid System and method is usefully and profitably used for the initial bidding stage
35 of a construction project alone. However, the same features and functionality that lends its use

to this stage, makes it very suitable for use through the entire project time line. For example, since the overlays and boxes are mapped to a pre-defined coordinate system, revised plans or sheets, if required at any project stage, may be submitted by the architect or owner without the necessity of re-drawing the boxes. The substitute sheets may be imported, and saved

- 5 (preferably after archiving the previous plan version) and existing overlays may be coordinated with the substitute plan sheets. Only the specific plan revisions need to be checked to see whether new boxes need to be created, or existing boxes need to be modified. Change orders can then be generated quickly and efficiently based on revisions by the method described for initial contracts.

10 **Bid System Service Provider**

In the preferred embodiment and method of the invention, the Bid System is operated by a dedicated service provider, referred to herein generally as a Bid System Service Provider (BSSP), which provides the support, software, hardware, and trained personnel to carry out all, or selected aspects of, the method of the invention. Even more preferred the BSSP may 15 operate the system over the Internet, this comprising of an Internet-based project management system and method.

Alternatively, the operation of the Bid System may be de-centralized to a selected degree. For example, the function of analyzing plans, creating overlays and contract/bid documents and entering corrections to these documents are alternatively performed by an

- 20 architect, general contractor, owner, or other person, or by a combination of these persons operating the system sequentially or interactively (in general, the "bid engineer" or "Operator"). A BSSP may still perform a wide variety of functions even when the Operator function is carried out by another party. As discussed below in connection with the various system embodiments and alternatives, the BSSP may function to archive data, maintain 25 database services for the benefit of other construction-oriented enterprises such as lenders, insurers, brokers, realtors, attorneys, and title companies. In addition, the BSSP preferably provides software licensing, training, technical support and consulting services to other Operator parties, such as an architectural firm, including an ongoing hotline and service support.

30 **Project Management Information**

The method of the invention may be carried out in phases during a project timeline, defining at appropriate stages the contractual obligations, scope of work and deliverables for the various persons and entities participating, such as architects, consultants, engineers, general contractors, and subcontractors. The Bid System may also include inputs and outputs from or 35 to various entities such as building code inspectors and building control services monitoring

progress on behalf of lenders. The Bid System includes defining and generating original bids and contracts, and also generating change orders which become necessary during construction.

The method may also include importing data and contracts for project-related contractual services not specified in conventional architectural plans, such as waste removal, security

- 5 services, and the like, followed by editing, bidding, and/or archiving these contracts within the Bid System.

The data import, interlinking, document creation, archival storage, database and communications are under control of one or more computer programs which are coded to perform the functionalities described herein.

- 10 The data import and interlinking steps of the Bid System method also may be used to import other information for project administration and monitoring purposes ("project documents"), such as progress reports, scheduling data, building inspector punch lists, and the like. The project documents can be subdivided and assigned overlays and/or icons by category

in the manner described above with respect to source records. These icons can then be associated and interlinked with the corresponding finalized subcontracts. Reports or displays

- 15 may then be generated to present contract information in functional association with other relevant project information.

The system and programs of the invention also provide for electronic archival storage of both the plans and the contracts at various stages of the bidding and construction process, 20 and provides for the preparation of as-built plans and the amendment of contracts to include change orders.

Plan/Overlay/Subdivision Linked Relational Database

The operation of the Bid System method of the invention typically includes the compilation of a database (the Bid System preferably includes a relational database

- 25 management system and programs) which comprises data pertaining to the plans, the overlays, and the overlay subdivisions (e.g., boxes). The data is linked to other data fields pertaining to project documents (e.g., contracts for owner, architect, contractor and subcontractors) as well as other project data such as timetables, regulatory approvals, inspections, checklists and the like.

30 The operation of the method of the Bid System also provides program capability for updating such data in the database on an ongoing basis through out the project timeline, and logs the history of reviews, changes, completions, communications, and the like.

Because this plan/overlay/subdivision linked database structure is relates the precise work description for each trade category (overlay/box data) to project documents and project

- 35 status, this database is singularly useful for other project related processes, such as builder's

control, project cost accounting, lender's controls, and the like. As many additional data fields may be created in the database as are needed to relate the project data to these industrial requirements and controlled and secure data access may be provided to third parties needing access to the database.

- 5 For example, a construction lender may access database fields that relate the project budget to the contract cost, preferably on an overlay-by-overlay and box-by-box basis. These database fields may be correlated with fields which log builder's control reports and building inspection check-offs, also on a an overlay-by-overlay and box-by-box basis. This database structure thus can give the lender exceptionally precise confirmation of the expenditure of loan
10 proceeds and the completion of project milestones.

Electronic Bidding

- The Bid System also permits fully electronic bidding, and may include means whereby suitably equipped subcontractors may view the contracts as computer-readable downloads, enter prices and other information, and submit bids by disk, modem, network or other remote
15 linkage (preferably with conventional electronic communication security and verification provisions). The accepted bids may then be printed, initialed, signed, and archived. In a electronic-bidding embodiment of the Bid System, plan features or fixtures within a box may be highlighted and hyperlinked to footnotes, bills of materials, checklists or other boxes (as with "box piercing" items). These enhancements may also be included in embodiments for use
20 with "hard copy" bidding, for use in internal error checking and operator convenience.

Internet Embodiments Of The Bid System Method And Software

- Internet access and connectivity may be included in a number of ways as an element of the Bid System of the invention. Internet embodiments of the Bid System preferably are centered on a Bid System Service Provider (BSSP) which operates a proprietary website. The
25 inclusion of Internet functionality may be integrated with the Bid System operation to various selected and differing depths or degrees, and such integration may be phased in time, as the BSSP becomes progressively established as a business. In addition, the functional differences in the exemplary Internet embodiments described below are not mandatory, a selected features and functions described in reference to one embodiment may optionally be including in another.
30

In addition, many of the BSSP functions described below with respect to Internet-based embodiments are equally valuable when included in off-net Bid System embodiments.

- First, support and marketing Internet embodiment.** In a first Internet embodiment of the Bid System of the invention, an Internet website may be created and operated by the
35 preferred Bid System Service Provider (BSSP) to provide a range of business support and

marketing functions, complementing the off-net operations of the Bid System. The BSSP website preferably comprises the following functions and features: Description of services provided by the company; a description of BSSP executives and their credentials; a contact list of BSSP staff with e-mail addresses and phone numbers; A list of testimonials from satisfied users; and a list of press releases about the BSSP. The BSSP website may also support a partnership or affiliate program to solicit strategic alliances and companies that have interest in partnering with Bid System Service Provider (BSSP); may be used to solicit applicants for job openings at Bid System Service Provider (BSSP); and offers training on the use of the Bid System.

- 10 **Second, central server remote host Internet embodiment.** In a second Internet embodiment of the Bid System of the invention, in addition to the Internet support and marketing functions listed above, BSSP website may also be used to manage the interaction and workflow of the various parties using or contributing to the Bid System operation.

In the second Internet embodiment, the website-based operation management function of this second Internet embodiment may comprise a referral service oriented to such parties, in effect to create a Internet-connected community of affiliates, architects, financial institutions, contractors, insurance companies and building control groups. Such parties may enter into contractual or service relationships related to the Bid System operation, and also may provide advertising support for BSSP.

- 20 The website may host on-line training, demonstrations, tutorials and technical support for the Bid System software for the above parties.

The website-based workflow management function of the second Internet embodiment preferably includes a BSSP server-based process to link, on a project-wide basis, the parties involved in the operation of the Bid System method, including: Owner/developer, Architect, Bid system service provider (BSSP), Contractor, Subcontractors; Builders control; Financial institution/lender; insurer, legal services, accounting services, engineering, and Other interested party (e.g., regulatory body, bankruptcy receiver).

- 30 The functions carried out through the Internet connectivity may include: submitting and sharing documents; submitting and reviewing bids; distribution of contracts; determining status of a given project; initiating loans; payout and lien management and the like.

In the second Internet embodiment, the system is preferably operated as a central remote host system, i.e., the software elements are principally or wholly resident on the BSSP servers, which host on-line processes and off-net processes including archiving, communications, and service billing. Each of the other linking parties noted above may access the BSSP website by means of a conventional Internet browser software running on

conventional PCs. For each project party, the BSSP via the central server may create an account, with appropriate conventional security and authentication controls, which allows that party to access particular BSSP website pages, e.g., project web pages supporting the functions of that party in the Bid System method. The central server software controls data exchange

- 5 between parties by authenticating data inputs, internally processing data as appropriate to the method step, storing and archiving data, and transferring data to the account pages of other parties to the project. The website on-line connectivity may be supplemented by automatic BSSP server-generated e-mail or fax messages to the project parties, in addition to conventional communications between the parties

- 10 **Third, distributed-server secondary-host Internet embodiment.** In a third Internet embodiment of the Bid System of the invention, the on-line operations of the Bid System are de-centralized to a selected degree. One or more Bid System parties or other business entities (secondary provider), such as an architect or project owner, may license Bid System software (typically from a BSSP as copyright owner or re-sale distributor) to permit the party to host
15 selected Bid System functions and method steps on a webserver operated by the secondary provider.

For example, the architect may elect to operate a secondary webserver linking to an owner, a contractor, a plurality of subcontractors, and optionally building control and/or project lenders. The BSSP, in addition to licensing software elements of the Bid System of the
20 invention, may host on-line demonstrations, tutorials, training and technical support for the Bid System software being operated by the architect. The secondary webserver may be created and operated for a particular project, or may be a continuing on-line service for a plurality of different projects.

- The BSSP typically may continue to host selected centralized functions, such as long-term record archiving of project data received from the secondary host, and archived data exchange services with customers such as title companies and lenders. Preferably, the BSSP acts as an expert consultant on an as-needed basis, in which BSSP personnel interact with secondary host personnel and other parties in, for example, solving problems, reviewing work to ensure accuracy, and the like.

- 30 **Auditor/consultant Internet/off-net embodiment.** The Internet embodiments (as well as the off-net Bid System embodiments) may also be used to advantage in projects where initial project construction has begun without the benefit of the Bid System. For example, where the parties to a non-Bid System project have serious disputes regarding their rights and obligations related to the scope of work, (e.g. owner vs. contractor, contractor vs. subcontractor, and the like), the BSSP may be retained to retrospectively apply the Bid System
35

method to the project, to provide an objective analysis of the project scope of work, to assist in resolution or arbitration of the dispute.

This BSSP service may also be used by parties other than the original project owner and contractor, who have financial interests in the project (e.g., a secured lender or receiver in bankruptcy), to "salvage" a project which is failing. The Bid System method in the auditor embodiment may include the appointment of substitutes for the original parties, such as a deputy contractor or deputy sub-contractor, to bid and/or complete or correct the original project work.

Context-Sensitive Query/Response Cascade For Bid System User Information

10 The Bid System of the invention, in both Internet and off-line embodiments, preferably includes an advanced "help" program utility to assist users in learning to use the system most efficiently and in the design phase of the project. One presently preferred system and method for this purpose is that Disclosed In The Related Application No. 60/174,989, Filed January 7, 2000, Entitled "Hierarchical Context-Sensitive Query/Response Cascade For Information

15 Access System With User-Selected Query Subset".

Query/response cascade information access system and computer programs disclosed provides an information pathway for frequently asked questions by users, and further provides a system whereby the user may learn about and initiate the use of the Bid System application program. The query/response system is adaptable to both locally resident and Internet based applications of the Bid System, permits the user to rapidly order, prioritize and select the information pathway, and to follow a chain or cascade of questions and answers through a plurality of levels.

Each level of the query/response cascade presents the user with an additional opportunity to order, prioritize and select further modifications to the inquiry pathway.

25 Furthermore, the questions at each level may be connected in the hierarchical access path to questions both lateral and above it. The questions and answers at each level may be hyperlinked to other resources, and may be linked to operational menus within the application program, thus allowing the user to directly move back and forth between the information access methodology and the application program operational methodology. The system includes a 30 tracking/monitoring mechanism to allow a user-specific inquiry path profile to be compiled, both for customized information access system response and for other application purposes.

Any other suitable FAQ or help line programs can provide assistance to an owner or developer in designing a building for a particular site or usage.

BRIEF DESCRIPTION OF DRAWINGS:

The invention is described in more detail in the accompanying drawings, in which:

- 5 **Figure 1** is an exemplary sheet of conventional architectural plans showing a East elevation (on left hand) and a South elevation (on right hand) of a building to be constructed;

Figures 2A-C are each detail display views of the East elevation of the plans of **Fig. 1**; **Fig. 2A** showing the conventional drawing, **Fig. 2B** showing a corresponding exemplary “doors and windows” overlay display of the Bid System of the invention, and **Fig. 2C** showing the overlay of **Fig. 2B** superimposed upon the detail view of **Fig. 2A**;

- 10 **Figures 3A-C** are each detail display views of the South elevation of the plans of **Fig. 1**; **Fig. 3A** showing the conventional drawing, **Fig. 3B** showing a corresponding exemplary “doors and windows” overlay display of the Bid System of the invention, and **Fig. 3C** showing the overlay of **Fig. 3B** superimposed upon the detail view of **Fig. 3A**;

- 15 **Figures 4 through 20** are a series of sequence diagrams which depict the steps described in **Table 1** (cross referenced by figure number in the table) of a preferred and exemplary method of the invention to objects which may be coded as software using conventional object-oriented programming languages;

- 20 **Figure 21** is a class diagram of a preferred and exemplary embodiment of the Bid System of the invention, relating the method of the invention to the objects depicted in **Figs. 4-20**;

Figure 22 is a diagram of an Internet-based Bid System of the invention, in which the Bid System is hosted on a central remote host webserver/system processor; and **Fig. 23** is a schematic of the one embodiment of the method of the invention as realized in an Internet-based business operator.

- 25 **Figure 23** is a schematic of one embodiment of the method of the invention as realized in an Internet-based business operation.

The Appendix, which includes:

Table 1, a logical view chart of the objects and operations depicted in **Figs. 4-20**.

- 30 **Exhibit A** is an exemplary and preferred organizational chart of overlay and subcontract categories such as may be used in the Bid System of the invention; and

Exhibit B is an exemplary subcontract as used in the method of the invention, showing the references or icons linked to the boxes and plans as shown in **Figs. 1-3**;

adaptations, variations, alternatives and uses of the invention, including what is presently believed to be the best modes of carrying out the invention.

In this regard, the invention is illustrated in the several figures, and is of sufficient complexity that the many parts, interrelationships, and sub-combinations thereof simply cannot

- 5 be fully illustrated in a single patent-type drawing. For clarity and conciseness, several of the drawings show in schematic, or omit, parts that are not essential in that drawing to a description of a particular feature, aspect or principle of the invention being disclosed. Thus, the best mode embodiment of one feature may be shown in one drawing, and the best mode of another feature will be called out in another drawing.

- 10 **Fig. 1** shows an example of a sheet of architectural plans as displayed in the Bid System of the invention, showing an East elevation (on the left) and a South elevation (on the right) of a building to be constructed using the Bid System of the invention. Note that the plans includes a coordinate grid system with the ordinates and decimal subdivisions displayed on the vertical and horizontal borders. In this example, decimal numeric ordinates
15 are used in the vertical direction and decimal alphabetic ordinates are used in the horizontal direction. In this example, the alphabetic coordinates A-J are used decimal as equivalent to the numerals 0-9. This is comparable to the grid systems conventionally used in spreadsheets, with additional decimal subdivisions. Each point position on the plans may be described by a coordinate pair including a vertical coordinate and a horizontal coordinate. Thus a point grid
20 location to three-figure precision could be described, for example, as "D.FC:5.42". Other alternative coordinate systems may be used. As described below in connection with Fig. 23, this is the type of drawing that architects 160 would submit to BSSP 400, for box, overlay, and linking services 340.

- Figure 2A is a detail display view of the East elevation of the plans of **Fig. 1**. **Fig. 2B**
25 showing a corresponding exemplary overlay display of the Bid System of the invention for the subcontract category "door and window installation". **Fig. 2C** shows the overlay of **Fig. 2B** superimposed upon the detail view of **Fig. 2A**. Similarly, Figs 3A-C show a detail view of the South elevation of the plans of **Fig. 1** (**Fig. 3A**); a corresponding "doors and windows" overlay display (**Fig. 3B**); and the overlay superimposed upon the detail view (**Fig. 3C**). Referring to
30 Fig. 23, Figures 2A-3C thus represent the results of the BSSP services as returned to the architects 160 for inclusion in a bid package for contractors 220, lenders 600, etc.

- Exhibit A** of the **Appendix** is a organizational chart of preferred subcontract categories and subcategories which may be used in creating overlays of the Bid System of the invention. The preferred computer-based embodiment of the Bid System includes menu-based checklists
35 to assist the operator in creating the overlays. While not all categories/subcategories shown in

- Exhibit A will be needed for every project, particular subcategories may be activated or deactivated from the menu list to fit the particular project plans by the computer user interface, such as by clicking subcategory "buttons" with a mouse. The operator may then create a corresponding overlay for each plan sheet related to the overlay category. The organized
- 5 checklist menus thus reduces the time required for the operator to completely analyze the plans and establish the needed overlays.

As seen may be seen in **Exhibit A**, the example overlay of Figs. 2 and 3 corresponds to category 007 (Framing), subcategory 16 (door and window installation). Preferably each box on the overlay is identified by a code and hyperlinked icon which includes information of

10 overlay category/subcategory, plan sheet number and a box identifier. For example, the uppermost box shown in Figs. 2B and 2C, is identified as "<{007-16-8-1}>", which represents subcontract category 7, subcategory 16 (as shown in **Exhibit A**), plan sheet 8 (see Fig. 1, lower right corner), box number 1.

Once the overlay is created, the operator of the Bid System draws boxes on the regions

15 of the sheet which correspond to the work category as shown in the examples of **Figs 2 and 3**. The size of the boxes depends on the nature of the work category being described. As the work is subdivided into smaller portions (boxes of smaller size or area), the degree of specificity tends to increase.

As described above, the system of boxes constitutes a system of almost-orthogonal

20 equations having the property that the progressive decrease in box size brings about a consequent progressive increase in the degree of transparency of the scope of work. Therefore, the operator preferably selects box sizes and shapes sufficiently small to exactly specify the work. This permits the coordinate box system to tie or link subcontract bid to the specific portions of the plan needed to exactly detail the subcontract performance obligation without

25 ambiguity.

In the preferred method of use of the Bid System, an optimum size of box is selected wherein the box is just small enough for full transparency (completely unambiguous description of the work), without loss of information, and without unnecessarily adding complexity to the project description. The optimum size will thus depend on the nature of the

30 overlay category and the physical elements of the plans involved. For example, excessively small subdivisions may obscure the connections or spacing between architectural elements, and create additional requirements notations and cross-references for "box piercing" elements to complete the description. In general, the optimum size will be readily apparent to the operator based on the nature of the trade category and the physical elements in the plans. For example,

35 an overlay box to describe framing floor joists will preferably include the full length of at least

two or more adjacent joists and their respective end connections, thereby depicting the center-to-center joist spacing and both end connections, without the need for "box piercing" references or notations.

- In the most typical form, a box of an overlay will be of rectangular form described by
- 5 contours connecting four corner points, and thus the box is defined by four coordinate pairs. The preferred computer-based Bid System includes graphic user-interface tools organized in "toolbars" to assist the operator in defining the boxes; such as the mouse button selector tools commonly used in graphic, photo-processing and CAD software applications. The selector tools preferably have selectable snap-fit features and decimal displays to allow the operator to
- 10 determine the corner coordinates of the box as it is being re-sized, re-shaped, moved or rotated. Specialized tools can assist the operator in establishing non-rectangular or more complex boxes for special plan elements. The coordinate pairs defining box location and geometry are stored in computer readable files in memory devices of the computer system (refer to computer system 500 of Fig. 23).

- 15 **Exhibit B** shows an example of a subcontract incorporating the icons and coordinates of the boxes shown in **Figs. 2 and 3**, and, referring to Fig. 23, would be provided to or made available to the selected sub-contractors 240 (and others on a need to know basis). In **section 8.3 of Exhibit B**, the location of the subcontract work is specified by incorporation of the pertinent boxes of the corresponding overlay, by incorporating the box icon identifiers and a
- 20 listing of the coordinate pairs of each corner of the box (additional coordinates may be listed for other box shapes). For example, the first box of **Fig. 2** is identified in section 8.3 of **Exhibit B** by its coded icon "{007-16-8-1}", the plan sheet number, and by its corner points A.FA:5.45; D.FA:5.45; D.FA:4.75 and A.FA:4.75. Note that each contract sheet preferably contains notations concerning any bid money amounts corresponding to work detailed on the
- 25 particular page, and the running totals of subcontract amounts based on the preceding pages, much like check stubs in a check book. In the preferred embodiment, the electronic subcontract files may include embedded tables or spreadsheet-like objects on each page which are software-linked to similar tables or objects on both preceding and following page, so that a fully current and complete running total of subcontract amounts is automatically shown each
- 30 page as bid revisions and additions are being entered into the database. Examples are shown in the upper and lower right-hand corners of each page of **Exhibit B**. When the finalized contracts are archived or printed as accepted, the bid amounts are preferably locked to prevent inadvertent alteration.

- In the preferred computer-based embodiment of the Bid System, the operator may
- 35 create an electronic file of the subcontract corresponding to a particular overlay

category/subcategory. The operator may then link each box created on each plan overlay sheet corresponding to this category/subcategory to the subcontract so as to automatically insert the box description (icon, sheet number and coordinate pairs) of each such box into the subcontract. If any subsequent modification of the box geometry is necessary, the coordinates shown in the subcontract may be automatically updated. This electronic linkage minimizes operator work time and error in preparing subcontracts which incorporate the box locations as part of the subcontract work description.

- In the approved and accepted subcontract, the plans and boxes are incorporated as exhibits to the subcontract and the box locations are part of the definition of the legal obligation to perform work under the contract. Thus each box is effectively incorporated into the subcontract as a discrete "deliverable". If any question or dispute arises as to the performance that portion of the subcontract, the box contains the necessary information to quickly resolve the dispute without reference to external documents. In its electronic form, the box icon in the subcontract may be hyperlinked to the plan sheet, so as to permit the corresponding portion of the plan to be displayed on the screen by clicking the subcontract icon.

- Although the drawing of boxes on the overlays of the Bid System is most effectively accomplished by an operator who has experience in reading architectural plans and the construction industry, the Bid System permits an experienced architect or contractor to quickly check the operator's work and enter corrections prior to the bidding process. Furthermore, the boxes, once checked and corrected as needed, represent a permanent addition of information to the plans.

- The judgment and decision making input of the operator and checking personnel during the box creation step represents a functional analysis and digestion of the plans, and is passed by interlinkage to each subcontract, and is thus available to bidding subcontractors (240 in Fig. 23) to increase the speed and accuracy of the bids. In addition, any comments or corrections that may be noted by subcontractors during the bidding process may be used to revise and refine the boxes of the relevant overlay, prior to the final acceptance of bids. Revisions or additional detail sheets may be added to the plans in an iterative interaction between the architects, contractors, sub-contractors, engineers etc., and the BSSP (see Fig. 23), if ambiguities or omission are discovered during the bidding process. These additional or corrected sheets can then be imported, new overlays created if needed, and the boxes edited or added as required. These plan enhancements, clarifications and corrections can then be interlinked to create revised versions of the relevant bid contracts.

Stated another way, the category/box/overlay system *adds information* of contract work scope to the plans, while at the same time, the icons and coordinates (and preferably hyperlinks, in the electronic form of the contract) effectively *add information* to the contract, well beyond that which would be contained in conventional verbal work descriptions. Thus,

5 the interlinkage of plans and contracts as embodied in the Bid System of the invention creates a bi-directional information flow between the plans database and the contracts database.

In addition to linkage of plans to contracts, an icon may be created and associated with another imported project source record other than a drawing ("source record"), such as bill of materials; engineer's notes; and the like. These are thus interlinked and incorporated into bids

10 and contracts. This procedure may be used to further specify contract or subcontract deliverables or to incorporate pertinent non-drawing project information into the contracts.

This may in general be achieved by the same steps as the subdivision and interlinkage of the plans as described above. The source record may be identified by assigning one or more "sheet" numbers to that source. An overlay for each relevant category may be created for the

15 record, identifying sub-portions by boxes and associating icons. Data may also be subdivided within the source record by linkage of the icon to one or more intrinsic internal record divisions, such as numbered sections, subsections or part numbers, or by linkage of the an icon to superimposed references system, such as page and line number ranges within the record.

These source record icons can then be interlinked to the corresponding contract document.

20 The preferred Bid System of the invention may also include interface with builder's control services ("builder's control") monitoring the project on behalf of lenders (see Fig. 23, item 360 and associated description below). Contracts and attachments may be output for their use, and reports or confirmations may be input, logged and archived. In addition, electronic copies of the completed plans, overlays, agreements, notes and subcontracts ("plan and bid documentation") may be provided for use by builder's control staff, for example in compact disk format viewable on a laptop computer at the project site. Comments and verification by the builder's control staff regarding the as-built completeness and correctness of the project work can be incorporated into the archive copy of the plan and bid documentation.

25 Incorporation of the builder's control verifications adds greatly to the information content of the plan and bid documentation, and are another example of the bi-directional flow of information in the Bid System, preferably Internet-based as described below with reference to Fig. 23. As records of the project history, the builder's control verifications may be more complete and meaningful than, for example, building inspectors reports, since the verifications pertain both to completion and correctness of code-required work and also to completion and

30 correctness of non-code work specified in the plans.

5 Optionally, the Bid System may include means to interlink boxes to additional notations or footnotes by footnote numbers and/or hyperlinks. The operator can create separately stored footnotes, such as additional checklists pertinent to a particular box or series or boxes; and associate the footnotes with the icons of the box. The footnotes can contain
10 comments added at each stage of the project and Bid System operation. If desired, footnotes can also be interlinked and incorporated into contracts and subcontracts. An item of work of the box category may "pierce" the box, as when an extended continuous member spans more than one box, such as a beam, pipe, conduit or the like. It is desirable to create a notation linked to each of the boxes noting this item of work, so it is clear that the bid item relates to
10 more than one box.

The Bid System includes means and method to create addendum sheets for recording and circulating requests for clarification from owner, contractor, and/or subcontractors, and for response by the architect with clarifying notes and/or plan revisions. These addendum sheets, when reviewed and approved, may become permanent revisions to the plans and may be
15 incorporated as revisions of the relevant contracts, by importing the addendum sheets into the Bid System, revising the plans, overlay and boxes, and revising the links and references in the contracts, as needed.

20 The Bid System optionally and preferably includes menu-driven prompts and templates suitable for creating checklists for particular trade categories. In this manner the Bid System and method can provide added value to the conventional plans, and assist the operator in the process of generation the overlays and boxes. The Bid System operator will typically approach the step of drawing boxes in a manner which influenced by the trade category involved, and the degree of subdivision will generally reflect this, as shown in the following examples:

25 For example, a framing contract will typically address a large number of pieces and substructures throughout, and thus benefit from the creation of a comparatively large number of boxes. Since the exterior walls are often laid out and erected first, the operator may put boxes on each elevation plan of exterior walls, followed by interior walls. Additional boxes may be applied to framing details such as doors, windows, archways, stairs, balconies, and the like. Likewise boxes may be drawn to isolate special hardware or other structural elements for clarity.
30

As another example, roofing contract work will typically address a single or few large continuous surfaces, although the Bid System the operator may determine that various structural portions of the roof will be most precisely described by being isolated in individual boxes, such as a roof ridge detail, a roof-wall junction, a chimney junction, a flat portion using
35 different materials versus a peaked portion, and the like. In this process of subdividing the

plans into functionally and structurally cohesive portions, the tasks required in doing the work become progressively more clear.

As another example, electrical contract work may typically be best defined by subdividing the plans into rooms, and including a checklist of hardware specific to each room,
5 with additional boxes to show elements such as conduits, service panels, and the like.

Figures 4 through 20 illustrate one exemplary preferred embodiment of the method of the invention, including various sub-methods and optional steps. In this example, the method is preferably carried out primarily by a professional Bid System service provider (BSSP) who works with the architect, owner, general contractor and subcontractors to administer the bid
10 process. For simplicity and clarity, the embodiment of the Bid System shown in Figs. 4-20 is oriented to a single computer system operating entity, the BSSP, who communicates with the other participants as needed. Other alternative embodiments support multiple users, such as interactive inputs from various persons operating machines linked over a LAN or WAN, such as the Internet. This description of Figs. 4-20 should be read in the context of operation of the
15 BSSP 400 in Fig. 23 providing the described services, preferably via Internet, LAN or WAN 120 for the various users (the left column 140-260 in Fig. 23) as an integrated Internet business method aspect of the invention.

Figs. 4-20 also show certain steps related to business objectives and considerations suitable to this purpose, but do not include all optional or alternative method steps of the
20 invention. This embodiment represents a exemplary “normal routine” of carrying out the method of the invention as computerized, and preferably Internet-based. The order of steps shown is typical, but the steps may be performed in any operative order. It is understood that, in general, each step can be further broken down into substeps involving particular conventional business, clerical, user input and computer operations which will be apparent to
25 one of ordinary skill in the art from reading this Description and Figures. In addition, steps may be repeated on an as-needed basis for overlay, box, contract and plan revisions, clarification, and the like.

In Each of the Figs. 4-20, the operations are shown with respect to a common time line (shown as a dashed line) extending downward from each party or database system component.

30 Thus, the activities to carryout the method may be traced by proceeding top-to-bottom in each figure. The manual or inter-party communication operation steps are shown extending to the left of the BSSP timeline, while the computer or database operation steps are shown to the right of the BSSP timeline. Note that the computer and logic operations and database objects shown in Figs. 4-20 are those shown in the Class diagram of Fig. 21 and also in Table 2 below. One
35 of ordinary skill in the art will be able to code suitable software instructions to carry out the

method described using conventional computer hardware, memory media and I/O devices. It should be understood that the database and computer file architecture shown is only exemplary, and a number of different conventional database protocols may be employed in creating the database of the bid system of the invention. The reference below to "logging" also preferably includes saving the document to the computer system memory 500 in Fig. 23).

Fig. 4 shows the project initialization sub-method. The project owner ("Client" or owners/developers 140 referenced in Fig. 23) enters into a bid services contract with the Bid System (100 in Fig. 23) service provider, BSSP (400 in Fig. 23). The BSSP creates a file project file (**Create()**) and links this to an assigned icon (**Link()**). The BSSP then imports the services contract (**Create()**) into the database, and links this also to an assigned icon. The date of contract importation is logged (**LogContractImportDate()**).

Fig. 5 shows the owner/architect agreement sub-method. In this example, the client has hired an architect to produce a complete set of architectural drawings, at least sufficient to obtain a building permit, and typically to consult in project management. Optionally, the client may provide the plans from another source, without including an architect as a project participant. This agreement details the obligations of the architect through the course of the job. After both owner and architect (160 in Fig. 23) have signed the agreement and transmitted this to the BSSP, the owner/architect contract is imported into the database system as a component of the project and the import date is logged. An icon which will link the contract to the project is assigned to the owner/architect contract.

Fig. 6 shows the architectural drawings import sub-method. In this example, the architect delivers this completed set of plans to the BSSP per requirements of the owner /architect agreement, the drawings are imported (e.g., by scanning or electronic file transfer), a linking icon is assigned, and the import is logged (see also 340 in Fig. 23).

Fig. 7 shows the overlay creation sub-method. In this example, the BSSP creates overlays (with grids) based on the list of Bid System sub-contractor categories and subcategories. A list of subcategories and prompts are accessed from the database. The BSSP may query the subcategory list (and optionally create new subcategories), select a drawing sheet, create overlays and create a grid for the overlay coordinate with the drawing sheet grid.

Preferably, one overlay is created for each drawing sheet and each Bid System subcontract category relevant to the drawing sheet. The BSSP creates boxes on the overlays on each sheet of the drawings. The boxes preferably cover the entire sheet, including areas that are void of information directly related to the specific sub-category. In this way every portion of the drawing is labeled and accounted for.

Fig. 8 shows the box creation and annotation sub-method. In this example, the BSSP creates boxes upon each overlay corresponding to and defining the position of drawing elements relevant to the overlay category/subcategory. Relevant box annotations are included, e.g., material specifications and the like, and to cross-reference and define the continuity of box-piercing elements which are also elements included in adjoining boxes. The BSSP completes entries for each box of each overlay. The date that this is completed is logged/saved.

Fig. 9 shows the box/overlay review sub-method. In this example, the BSSP creates a hard copy of the overlays superimposed on plans, and transmits this to the client and/or for review. Optionally the BSSP may export an equivalent electronic file viewable by the client. Preferably, this is via a project webpage assigned and available on the website 300, in Fig. 23. The client comments and corrections to the overlays/boxes are transmitted to the BSSP. Any clarification or plan changes that the client requests of the architect and/or any changes that the client requests in the overlays and boxes may documented by the BSSP on as addendum form, which is created logged and linked in the project database. Note that the architect optionally may also review the overlays/boxes recommendations in consultation with the client at this stage (see **Fig. 13** re architect plan clarifications).

Fig. 10 shows the Owner/Contractor Bidding Agreement sub-method. In this example, the contractor (220 in Fig. 23) is hired by client to collect all bids for the project and an Owner/Contractor Bidding Agreement is signed by each party and transmitted to the BSSP. This contract is imported into system database, logged, saved, and a job-specific icon is attached to this agreement.

Fig. 11 shows the Contractor plans/overlays/box review sub-method. In this example, the BSSP creates a hardcopy of the plans/overlays/boxes and transmits this to the contractor for review. Any changes in the box definitions desired by the contractor or requests for clarification are transmitted to the BSSP. Any changes or clarification that the contractor requests may documented by the BSSP on as addendum form, which is created logged and linked in the project database. Additionally and optionally, the contractor requests may be reviewed and approved by the client and/or architect at this stage.

Fig. 12 shows the box and overlay edit and modification sub-method. In this example, the BSSP modifies the boxes and overlays according to the client/architect/contractor review instructions, if needed.

Fig. 13 shows the architect plan clarification and modification sub-method. In this example, the BSSP prints hardcopy of the plans with the addendum requests of client and contractor. The BSSP delivers plans to architect with points of clarification required by client

and contractor on their respective addendum sheets. The date is logged. Architect makes clarifications to plans per addendum sheets. The architect prepares a final addendum, which becomes a permanent part of the plans (and by inclusion, part of the contract). Architect returns amended plans and addendum to the BSSP. The architect's addendum is imported and 5 logged by the BSSP. Note: "Addendum" is used to mean clarifications to the original plans without drawing changes (see plan modifications in Fig. 18). Optionally, the architect may make drawing corrections at this stage also.

- Fig. 14** shows the final plans printing sub-method. In this example, the BSSP may make adjustments to box/overlay system as needed per changes and or clarifications by 10 Architect (see sub-method of **Fig. 12**). These are logged into system. A hard copy of plans with overlays is output and logged.

Fig. 15 shows the client final review and acceptance of the plans. In this example, the BSSP creates hardcopy of the final plans and delivers to client for review. The client reviews plans and overlays and either asks for further clarification (see **Fig. 12**) or signs statement of 15 acceptance for this version of overlays and boxes, and returns to the BSSP. The acceptance is then imported logged and linked.

Fig. 16 shows the contractor final review and acceptance of the plans. In this example, the BSSP creates hardcopy of the final plans and delivers to contractor for review. The contractor reviews plans and overlays and either asks for further clarification (see **Fig. 12**) or signs statement of acceptance for this version of overlays and boxes, and returns to the BSSP. The acceptance is then imported logged and linked.

Fig. 17 shows the logging of the acceptance of client and contractor. In this example, the BSSP creates and logs the document of **Fig. 15** and **16** (reviewed and accepted addendum sheets and amended plans) into the system. The BSSP links the boxes to the contract by means 25 of the Bid System icon. Plans with overlays and related contracts are output to hard copy.

Fig. 18 shows the subcontract bid generation and distribution sub-method. In this example, the BSSP generates the subcontract bid documents, e.g., using bid system database, including the plans/overlays/boxes, subcontract templates, and project information. Contractors receive from the BSSP a package of plans with overlays and related sub-contracts. 30 The acceptance of these items is logged into the system. The contractor undertakes the task of meeting with potential subcontractors (240 in **Fig. 23**), distributing the bid documents to respective subcontractors and collecting bids for each sub-contract as outlined in owner/contractor bidding agreement.

If any sub-contractor requests clarification from architect, these requests are noted on 35 supplemental addendum form. Contractor completes initial meetings with all sub-contractors,

if there are requests for clarification, all materials are returned to the BSSP, who logs this into system. At this point there are no signed bids. All items for clarification from sub-contractors are transmitted to the architect, via a Subcontractors Addendum/Clarification Document. This date is logged into system. The architect addresses requests for clarification, makes changes on 5 plans accordingly. Architect returns revised plans to the BSSP. This is logged into system.

The BSSP checks to see if clarifications/changes by architect require changes in box system. If definition and parameters of any boxes are changed (see Fig. 12), then all associated subcontracts may be changed also, and all links (with icon) are adjusted accordingly.

Fig. 19 shows the final subcontract bid distribution sub-method. In this example, the 10 BSSP makes a determination that the current version of plans, contracts and overlays is complete. The BSSP then saves and logs this version into system, and outputs hard copy of plans with overlays. Revised plans/subcontracts overlays are transmitted to contractor and the date is logged into system. The contractor in turn transmits the plans/subcontracts to subcontractors to obtain signature from sub-contractors for all subcontracts. The contractor 15 returns signed subcontracts to the BSSP, and this date is logged. The signed subcontracts are preferably scanned into system database by the BSSP as project records.

Fig. 20 shows the final contract review and confirmation sub-method. In this example, the BSSP generates hard copy of all subcontracts, along with inserted copies of "intermediate" 20 pages, as defined in Owner/Contractor Agreement. In this phase, builder's control provisions may also be inserted per the Owner/Contractor Agreement. These delineate the timing and sequence of the interaction between the Builder's Control and the Contractor and Builders Control and the owner. All pages are numbered in sequence, the final hard copy is transmitted to contractor, and the date is logged.

The contractor acknowledges/comments on the sequence of construction for the project 25 in the documents. Contractor checks subcontract documents for accuracy, adds his fee to the document, and returns documents to Bid System. The date is logged. The owner and contractor review all subcontract documents, and place signatures on completed documents, and return to the BSSP.

Signed subcontract documents are logged into Bid system for archive. A hard copy of 30 each subcontract is given to owner and contractor along with CD-ROM.

- Fig. 21 is a class diagram of a preferred and exemplary embodiment of the Bid System of the invention, which breaks down the preferred method of operation into smaller components that focus on real world objects. These exemplary objects are easily translated into computer-readable code written in conventional object-oriented programming languages,
- 5 such as C++ or Java. The sequence diagrams of Figs. 4-20, in turn tie the objects of the class diagram of Fig. 21 with the steps shown in Table 1. Table 1, included in the Appendix, is a logical view chart of the exemplary objects and operations depicted in the sequence diagrams of Figs. 4-20 and the class diagram of Fig. 21, giving descriptions which set forth the properties of the objects.
- 10 Fig. 22 is a diagram of a central-server remote host Internet embodiment of the Bid System 100 of the invention. In this embodiment, the transmittal of data, including plans, overlays, contracts, bids, comments, instructions, review status, edits, changes and the like is preferably via the Internet 120. The Bid System is preferably operated principally on a central remote host server 101 which is maintained and operated by the Bid System Service Provider
- 15 (BSSP) 400 i.e., the software elements are principally or wholly resident on the BSSP servers 101, which host on-line processes and off-net processes. Each of the other linking parties may access the BSSP website 300 by means of a conventional Internet browser software running on conventional PCs. For each project party, the BSSP via the central server may create an account, with appropriate conventional security and authentication controls, which allows that
- 20 party to access particular BSSP website pages supporting the functions of that party in the Bid System method. The website software preferably manages the interaction of each such party through links to related pages, and by response pages. The central server 101 controls data exchange between parties by authenticating data inputs, internally processing data as appropriate to the method step, storing and archiving data, and transferring data to the account
- 25 pages of other parties to the project, and communications between it and the parties, and inter-parties, as needed.

The website-based workflow management functions preferably includes linking, via the BSSP website and BSSP processing functions, the interaction of at least the following parties involved in the operation of the Bid System method:

- 30 Bid System Service Provider 400: **Host** and manage BSSP website 300 (e.g., create & manage accounts, account security, process data with Bid System software and archive data, transfer data & documents between accounts, prepare and process billing and receipts, and the like. Optionally as Operator, create & edit overlays, contracts, etc.).

- 35 Owner/developer 160: Access to Owner account webpage (e.g. review plans/overlays/bids, submit corrections, review & accept plans contracts, and the like).

Architect 103: Access to Architect account webpage (e.g. create & edit overlays and plans, create bid requests, review bids, corrections and completed contracts, and the like. As Operator, create & edit overlay, contracts and plans, etc.).

General Contractor 220: Access to Contractor account webpage (e.g. review plans, 5 overlays, bids; submit corrections, review & accept subcontracts; and the like).

Subcontractors 240: Access to specific Subcontractor account webpage (e.g. review plans, overlays, bid request; submit bids and corrections, receive subcontracts; and the like).

Related parties 260 (e.g., Builder's Control 200, engineers/surveyors 180, lending institutions): Access to specific Related Party account webpage (e.g. review plans and 10 contracts, submit inspection reports, receive progress reports and the like).

The website on-line connectivity may be supplemented by automatic BSSP server-generated e-mail or fax messages to the project parties, in addition to conventional communications between the parties. Automatic e-mail messages may be used to queue parties to log-on to their respective account pages when data/documents are ready for their review or 15 further processing. This may greatly simplify the interactions of the various parties in terms of time schedules and the like, particularly in the case of subcontractors who may not be available (do to on-site work) during typical business hours. With the increasing availability of wireless technology, Internet connectivity will be increasingly available at project site locations.

The centralized server permits the parties to avoid the expense and risks of maintaining 20 specialized software and sensitive data on a plurality of servers. The central host website permits data transmission delays to be minimized, as each party need only transmit its specific inputs, and download only that data which is actually to be viewed by that party. Since, each party (other than BSSP) need only have available a conventional Internet capable personal computer, the range of parties who may contribute to the Bid System process is extremely 25 broad. Due to its centralized operation by a professional service provider, the BSSP server may be economically made highly secure in terms of unauthorized access and in terms of data loss. The website on-line connectivity may be supplemented by automatic BSSP server-generated e-mail or fax messages to the project parties, in addition to conventional communications between the parties

30 **Computer System.** The method of the present invention can be executed on the conventional computer hardware which use conventional operating systems by means of software running on a suitable processor (in particular, a processor of a general purpose digital computer), or by any suitable combination of hardware and software. The software can be accessed by a processor using any suitable reader device which can read the medium on which 35 the software is stored.

One of ordinary skill in the art, having studied the Description and drawings herein, including the sequence diagrams, class diagrams and object definitions, will be able to write software code using conventional programming languages to carry out the steps of the method of the invention set forth herein.

- 5 The software may be stored on any suitable computer readable storage medium. The computer readable storage medium can include, for example: magnetic storage media such as magnetic disc (such as a floppy disc) or magnetic tape; optical storage media such as optical disc, optical tape, or machine readable bar code; solid state electronic storage devices such as random access memory (RAM) or read only memory (ROM); or any other physical device or
10 medium employed to store a computer program. The software carries program code which, when read by the computer, causes the computer to execute any or all of the steps of the methods disclosed in this application.

INDUSTRIAL APPLICABILITY:

- 15 It is evident that the improved Bid System and method of the invention have wide industrial applicability to the construction industry and other uses. In particular, this system may be additionally used for managing and administering aspects of the construction projects in addition the contract bidding operations. The method and system are suitable for use with a wide variety of network and other remote linkage means connecting multiple work stations or
20 desktop computers to provide a distributed, interactive Bid System suitable for electronic subcontract bidding.

Figure 23 illustrates one realization of the Internet business method aspect of the invention. The Bid Constructor System 100 is linked via Internet, LAN or WAN 120 to users, comprising one or more of: Owners/Developers 160; Engineering, Surveying Professionals 25 180; Permit/Inspection Services and Officials 200; Contractors 220; Sub-Contractors 240 and other Ancillary Service Providers 260. These users can also interact among themselves via the Internet or by other conventional means 280, e.g., mail, courier, direct e-mail, face to face meetings, telephone, fax, etc. As described in detail above, the bulk of the contacts are between the owners/developers, architects, permit and inspection service officials, contractors 30 and subcontractors, and their major interface for the bid/constructor services is via the system web site 300.

In the Internet-based business method, the owners/developers 140 access web site 300 to acquaint themselves with the services and to receive a services engagement contract with the Bid System operator. Upon acceptance, which is preferably electronic, the owners/developers 35 then select an appropriate service from the site map. In an important option, the initial access

is to the design assistance services pages 320. Via the query/response question chain program described in more detail in co-pending application 60/174,989, filed January 7, 2000, the disclosure of which is incorporated by reference herein, or other suitable, commercially available interview /selection system, such as a library of home designs in a relational database 5 searchable by one or more selected requirements profiles, the owners/developers can determine their preferences for a design for a particular property, and the related construction requirements for that design. This is particularly useful in cases in which the owner/developer does not have a precise idea in mind for the property, e.g., property owners wanting to build their "dream home", which may be vague or incomplete in important respects in one or more 10 substantive aspects. The results are communicated to the owners/developers 140, e.g., by download, e-mail, hard copy, etc., and if so designated, to their architects 160.

The results at this stage, and indeed, at each step are saved for future access in a particular client user/project file by unique identifier in archive memory in the computer system 500 of the bid system 100. The arrows 900 schematically indicate the linked aspect of 15 the computer system and represents the transfer of data, images, text, etc., in the bid system 100. For example, the computer system 500 includes web and/or network servers for rendering, framing, linking, upload and download of pages, associated user commands and responses, etc., in the conventional manner. It also encompasses the internal transfer of the 20 saved client user/project file documents, and the functions of the BSSP staff 400 working on their workstations on electronic data entry, document creation and processing, communications, etc.

In the next step, the owners/developers collaborate directly 280 or via Internet, LAN or 25 WAN 120 with their architects on designing the project, including generation of the drawings and specifications. Employing the Drawing, Bid and Contract Management services 340 of the site 300, the Architect submits the drawings and specifications to the bid system 100. This may be done either via the web site 300 or via e-mail 700, and preferably posts a notification on the assigned project bulletin board to the owner/developer. The BSSP staffer retrieves and processes the drawings/specs sent by the architect by employing the program as described above to create the boxes and overlays, in the process, noting any discrepancies and 30 communicates them to the designated parties, e.g., owners/developers and architects, typically via e-mail. Or an "Analysis-completed" notification is sent them, and the linked boxes and overlays are posted on the assigned project web page for retrieval at the convenience of the client and architects. The architects correct the drawings and resubmit to the BSSP for further review and linking. This process is iteratively repeated, and may involve engineers, surveyors 35 180, permit officials and/or other ancillary service providers 260, until the design phase is

completed and no omissions are revealed. For each deliverable object, bid forms are then generated by the BSSP and linked to their corresponding processed drawings. Notification of availability is sent to appropriate contractors from which bids are desired by e-mail. In addition, the original drawings, overlays, specifications, specification overlays, permits, 5 engineering reports, bid forms and related documentation (e.g., Request For Bids with deadlines) are saved in dedicated archive memory for future use and reference.

The contractors 220 retrieve the corresponding bid package comprising the drawings, specifications and bid forms, and any other related documentation needed e.g., RFBs, and notification is sent to the appropriate sub-contractors 240 from which bids are desired. In turn, 10 each sub-contractor, for each appropriate deliverable object, retrieves the corresponding bid package. After review and processing, the sub-contractor enters and electronically signs its bid, including the required details of labor and material costs, bond, insurance information, availability, sequencing (prior work done requirements, etc.), and notifies the contractor(s). Typically, each contractor has its preferred set of sub-contractors, but some subs may work for 15 a number of contractors, and correspondingly, some contractors may request bids from more than one sub-contractor on a particular deliverable object. The signed bids are saved in the system 500.

This process may occur by e-mail, or may be facilitated by, or elected by the owner/developer in concert with its architect, to be posted to the project web page. Typically 20 each project web page is password protected, and, especially in the case of competitive bids, either encrypted or each contractor is assigned a sub-page under the project page (linked to it), so that the bids in effect remain electronically "sealed", as noted in arrow 700 in Fig 23.

The contractors review the sub-contractor bids, approves selected sub-contract bids, and 25 electronically countersigns them, either creating appropriate contracts (e.g., contracts conditional on it being awarded the project contract) and reserving the sub-contractors services. In turn, the contractors finalize their bids, electronically sign them and forward to the BSSP, where they are appropriately posted on (or made accessible via hyperlink from) the project page, and are archived. The owners/developers and architects are notified that the bid package (the completed RFB) is available for review and award. That is done, and the selected 30 (winning) bid is countersigned by the owner/developer and the contractor is notified by e-mail.

Typically, a number of affiliate services 600 are involved at one or more steps of this 35 bid management stage 340. The web site 300 preferably identify and provide hyperlinks 380 to approved affiliates who provide services to the clients of the BSSP, under fee based contracts 800 with the BSSP. These contracts typically call for commissions to be paid to the BSSP for the referral and use of the various services of the bid system and access to the web site 300 and

the documentation generated and archived. For example, one or more lenders, insurers, lawyers, accountants, and title companies may be involved in review of one or more aspects of the bidding process and the ultimate approval of the bids before a project contract can be let.

As before, the access to the documents is preferably via the project web page, or the secure,

- 5 sealed bid packages submitted and archived, and communication are handled by e-mail 720. To the extent approvals or other types of sign-offs are required, the appropriate lender, insurer, title company, lawyer electronically signs the necessary forms, forwards them to the BSSP where they are archived, and the appropriate parties, e.g., contractors, architects and owners/developer are notified by e-mail. Formal notification e-mails are also archived in the
- 10 bid system computers 500 for record purposes.

The winning contractor notifies its sub-contractors via e-mail, who retrieve their bid packages from memory 500 for use in performing their work. To the extent that the various documents have not been forwarded to the BSSP in CAD or other approved format, all participants submit the required paper (hard copy) documents for scanning and storage as

- 15 electronic images for future access.

Moving then to the builder Control services 360 of the inventive Bid System 100, the owner/builder, architect, lender and permit/inspection entities selectively employ the BSSP to perform ongoing project construction monitoring and/or management functions. The BSSP 400 generates reports from information contained in the contracts for builder control personnel

- 20 to review and use in their inspection and evaluation functions. These control personnel typically include construction oversight personnel in the developer, lender and architectural firms, and in the governmental offices responsible for inspection and code compliance, and approvals for payouts. All their documentation is submitted, preferably electronically including e-signatures, including sign-offs from owners, developers, lenders, insurers and
- 25 architects, which are archived. The BSSP services also include generation of delivery of progress reports, determine inspection schedules, and management of lien waivers. This process continues through generation of and monitoring of work under project change orders to the ultimate clearance of post construction check lists and the acceptance and final pay outs by owner and lender. Documentation is archived at each step. Finally the conversion from
- 30 construction loan to mortgage may also be managed and archived by the BSSP within the suite of services offered under the Internet-based business method of the invention employing the above-described bid system and its associated computer programs.

It should be noted that the archived plan and bid documentation created during the use of the Bid System of the invention may cumulatively constitute a valuable industrial asset.

- 35 Thus historical databases of completed construction projects may be compiled which are

searchable by persons, such as prospective buyers and lenders, who seek accurate and complete information related to the specifications and quality of the construction. These databases can be conveniently maintained by a service provider, such as a title insurance company, so as to be accessible in a commercially viable manner.

- 5 Furthermore, the mapping of overlays and boxes of system and method of the invention may be generalized as a mapping of subdivision defining regions to corresponding regions of an information-containing area, where the information-containing region may be in a wide variety of physical forms and may contain a wide variety of information types. Since this generalized embodiment of the system and method of the invention is likewise system of
10 almost-orthogonal equations, the generalized embodiment likewise has the property of tending to increased transparency as the degree of subdivision increases. Thus the system may also be used to advantage to control, manage and verify information in a variety of fields, including industrial design, engineering specifications, electronic circuit architecture, and the like.

- 15 It should be understood that various modifications within the scope of this invention can be made by one of ordinary skill in the art without departing from the spirit thereof. It is therefore wished that this invention be defined by the scope of the appended claims as broadly as the prior art will permit, and in view of the specification if need be.

APPENDIX

Operation Or Attribute	TABLE 1 - Logic Objects And Attributes Description Of Object Or Operation (See Class Diagram - Fig. 20)
CLIENT (Owner)	The client represents the customer with a project to be built.
CONTRACT	The contract is an agreement between signed parties to do a specified amount of work.
Private Attributes	micon: icon - An icon will link all phases of the project together. This is assigned to a document.
Public Operations:	Create(): Boolean - The "BSSP" will create a project for a client. ImportContract(): Boolean - The ability to take an existing contract and import/scan into the system. Print(): - The ability to print the current contract. Select(): Contract - The ability to select the current contract.
OPERATOR (BSSP)	The operator or bid engineer is the main user of the Bid System who will be responsible for the maintenance of the entire life cycle of the project.
PROJECT Public Operations:	The Project represents the profile for a specific job. Create() : Boolean - The "Bid Engineer" will create a project for a client. InsertContract (aContract : Contract) : Boolean - The ability to insert a contract into the project by means of import or scan. InsertArchitecturalDrawings () : Boolean - The "Bid Engineer" inserts the Architectural Drawings into the project. OpenProject () : Boolean - The ability to open the current project. SaveProject () : Boolean - The ability to save the current project.
ARCHITECT DRAWINGS Public Operations:	The Architectural Drawings are the actual drawings that the architect provides for this project. Create () : boolean - The ability to create the attributes for a specific drawing. ImportDrawings () : Boolean - The ability to import existing drawings provided by the architect. SelectDrawings () : Drawing - The ability to select the current drawing. PrintDrawings () : - The ability to print the current drawing.
ARCHITECT	The Architect is responsible for designing the drawing for a specific project.
OWNER ARCHITECT AGREEMENT	This agreement details the obligations of the architect through the course of the project. It is understood that the client has hired an architect to produce a complete set of architectural drawings. ("complete" means at least enough detail to obtain a building permit.)

LOG	The Log tracks key activities that occurred during the life cycle of the project
Public Operations:	LogAllBoxesCompletedDate() : Date - Log date when the bid engineer completes all boxes on all overlays.

Operation Or Attribute	TABLE 1 - Logic Objects And Attributes Description Of Object Or Operation (See Class Diagram - Fig. 20)
LogOwner	ArchitectSignDate () : Boolean LogContractImportDate () : Boolean LogOwnerContractorAgreementDate () : Boolean LogImportOfArchDrawingsDate () : Boolean LogAddendumFormDate () : Boolean LogBoxesModifiedDate () : Boolean LogPrintDate () : Boolean LogHardCopyCreationDate () : LogStatementofAcceptanceDate () : Boolean LogRequestClarificationDate () : LogArchitectClarificationDate () : Boolean LogContractorHardCopyReturnDate () : boolean
ICON	The Icon is one of the key component of the system in that it associates the visual aspects (i.e. boxes on drawings) with the verbal aspect (i.e. contracts) of the project.
Public Operations:	Link () : - The ability to tie one item with another
OVERLAY	<p>The overlay represents a layer on the architectural drawings that contains boxes associated with a particular sub-contractor category.</p> <p>Create (aSubContractorCategory : Sub-contractor categories) : boolean - The Bid Engineer creates the overlays.</p> <p>SelectOverlay () : Overlay - The ability to select an overlay</p> <p>FinalizeBoxes () : Boolean - The Bid Engineer will finalize the boxes. This will transfer the box coordinates to the appropriate contracts and fills all empty areas of the overlay with the null icon.</p> <p>PrintOverlays () : Boolean - The ability to print the overlay with boxes and grids.</p>
GRID Public Operations:	<p>The grid determines the coordinate system chosen for a drawing.</p> <p>Create () : Boolean - The overlay created by the Bid Engineer creates grids.</p>
SUB-CONTRACTOR CATEGORIES Public Operations:	<p>The sub-contractor categories contains the list of categories that will be bidden on by subcontractors.</p> <p>QueryList () : List - The ability to query the list of categories.</p>
BOXES Private Attributes Public Operations:	<p>The boxes represent the area of the drawing that is bid upon. This will divide and conquer the project into smaller components to create a more accurate bid.</p> <p>Icon : Icon - An icon will link all phases of the project together. This is assigned to the box.</p> <p>Create() : Boolean - The Bid Engineer creates boxes on the overlays on each sheet of the drawings.</p> <p>Modify () : Boolean - The Bid Engineer modifies boxes on the overlays on each sheet of the drawings.</p>

Operation Or Attribute	TABLE 1 - Logic Objects And Attributes Description Of Object Or Operation (See Class Diagram - Fig. 20)
Select () : Boxes - The ability to select a box.	
ADDENDUM FORM	The addendum form is a contract that allows for clarification in the drawings by the architect. Derived from Contract:
CONTRACTOR	<p>The Contractor is responsible for following:</p> <ol style="list-style-type: none"> 1. sub-contracting portion of the project 2. collecting bids 3. analyze/confirm accuracy of drawings between client and architect 4. building the project 5. obtaining signatures and signing of contracts
BID Public Operations:	<p>The bid is the cost related to each contract by each sub-contractor</p> <p>Create () Boolean - The sub-contractor creates bids for this project Collect () : Boolean - Contractor collect bids from the sub-contractor.</p>
HARD COPY Public Operations:	<p>The hard copy is a print out of the drawings, overlays, boxes, contracts and other associated documents to a project.</p> <p>Create () : Boolean - The create command will print the hard copy.</p>
STATEMENT OF ACCEPTANCE	The statement of acceptance is contract that is signed by the owner and the contractor upon acceptance of the hard copy of the project. Derived from Contract:
SUB-CONTRACTOR	The Sub-contractor is responsible for bidding and building the option associated with the project.
OWNER CONTRACTOR AGREEMENT	The Owner/Contractor Agreement is a contract between the owner and the contractor. This represents the signature of each party upon a specified task assigned to the contractor to collect the bids, etc. Derived from Contract:
DRAWING	The drawing is an individual architectural drawing.

EXHIBIT A - LIST OF SUBCONTRACTS

Reference Number	Subcontract Number	Category / Subcategory
	001	SITE CLEARING
1	001-01	Site clearing (brush landscaping, rocks any man made objects needing removal)
2	001-02	Hauling and clean-up of materials produced by site clearing
	002	EXCAVATION AND SITE WORK
3	002-01	Layout of excavations and rough grading
4	002-02	Rough grading
5	002-03	Excavation of all building foundation components
6	002-04	Excavation of footings for ret walls
7	002-05	Excavation for underground utilities and drain lines
8	002-06	Shoring (if required)
9	002-07	Hauling or storing excavated earth
10	002-08	Compacting of earth
	003	FOUNDATION
I 1	003-01	Layout and build foundation forms (surveyor?)
12	003-02	Layout and build forms for cmu ret. Wall footings
13	003-03	Construction of foundation forms
14	003-04	Construction of ret. Wall footing forms
15	003-05	Rebar installation
16	003-06	Rebar installation rebar in conc. Slabs
17	003-07	Installation of rebar in ret. Wall forms
18	003-08	Prepping of pad for slab
19	003-09	Install structural hardware (holddowns, A.B. etc.)
20	003-10	Pour footings, grade beams & pads
21	003-11	Pour slabs
22	003-12	Stripping of forms
23	003-13	Removal of debris
24	003-14	Backfilling at foundation
25	003-15	Backfilling at retaining walls
	004	MASONRY
26	004-01	CMU walls at foundation
27	004-02	CMU retaining walls
28	004-03	Fireplaces
29	004-04	Planters
	005	STRUCTURAL STEEL
30	005-01	Fabrication & delivery (including site measurements)
31	005-02	Installation) co-ordinated between framer/steel fabricator and foundation contractor: (crane may be needed)
32	005-03	Cutting / welding at site
33	005-04	Cutting / welding at site
	006	DRAINAGE
34	006-01	Subdrainage system
35	006-02	Sump pump garage floor?
36	006-03	Installation of surface drains
	007	FRAMING
37	007-01	Foundation cripple walls
38	007-02	Installation of subfloor system (inclusive from mudsill to plywood subfloor)
39	007-03	First floor walls (including shearwall systems)

EXHIBIT A - LIST OF SUBCONTRACTS

Reference Number	Subcontract Number	Category / Subcategory
40	007-04	Stairways
41	007-05	Upper floor walls
42	007-06	Upper wall framing
43	007-07	Roof and ceiling joist system
44	007-08	Trusses fabrication / delivery
45	007-09	Trusses installation
46	007-10	Fascia
47	007-11	Roof framing
48	007-12	Misc. Framing pick-up
49	007-13	Repair after other subs
50	007-14	Special architectural details
51	007-15	Purchase doors and windows
52	007-16	<u>Installation of doors and windows</u>
53	007-17	Regular and final cleanups
	008	ROOFING
54	009-01	Flashing & felt underlay
55	008-02	Waterproofing pre-roofing
56	008-03	Installation of tile roof
57	008-04	Any built up roofing (flat areas)
58	008-05	Install skylights
59	008-06	Clean-up and hauling of excess and waste roofing materials
	009	SHEETMETAL
60	009-01	Custom flashings & sheet metal
61	009-02	Rain gutters
	010	ELEVATORS
62	010-01	Freight elevator
63	010-02	Passenger elevator
	011	WATERPROOFING
64	011-01	Foundation walls
65	011-02	Exterior decks
66	011-03	Shower pans
	012	HEATING / AIR
67	012-01	Installation of FAU
68	012-02	Air conditioning system
	013	CENTRAL VAC SYSTEM
69	013-01	Installation - rough and finish
	014	ELECTRICAL
70	014-01	Install temp. Power pole for construction
71	014-02	All rough electrical
72	014-03	Service panel
73	014-04	SLJ13 panels
74	014-05	Elec. Finish
75	014-06	Security system
76	014-07	Installation of appliances
77	014-08	Cable TV
78	014-09	Telephone wiring
79	014-10	Landscape / site lighting & elec.
	015	PLUMBING

EXHIBIT A - LIST OF SUBCONTRACTS

Reference Number	Subcontract Number	Category / Subcategory
80	015-01	Temp water supply
81	015-02	All rough supply lines
82	015-03	Waste and vent lines
83	015-04	Connect waste line to street
94	015-05	Connect supply to city service
85	015-06	Steam system in shower
86	015-07	Set tubs (with frames?)
87	015-08	Run gas lines
88	015-09	Water heater
89	015-10	Install fixtures
90	015-11	Install finish
91	015-12	Drain lines for decks
	016	FIRE SPRINKLERS
92	016-01	Rough installation
93	016-02	Finish installation
	017	INSULATION
94	017-01	Floors, walls, ceilings
95	017-02	Water pipes / water heater
	018	STUCCO
96	018-01	Lath and paper
97	018-02	Metal corners & expansion joint metal
98	018-03	Stucco exterior
99	018-04	Stucco - architectural
100	018-05	Stucco retaining walls
101	018-06	Stucco planter
102	018-07	Clean-up
	019	DRYWALL
103	019-01	Ranging
104	019-02	Taping and finish
105	019-03	Clean-up
	020	PAINTING
106	020-01	Painting preparation
107	020-02	Interior walls
108	020-03	Interior trim & woodwork
109	020-04	Special interior architectural
110	020-05	Staircase & handrails,
111	020-06	Special exterior architectural
112	020-07	Exterior trim, doors & windows
113	020-08	Elastomeric exterior
114	020-09	Wrought iron
115	020-10	Sheet metal
116	020-11	Rain gutters
117	020-12	Caulking and sealing
118	020-13	Cabinets
119	020-14	Spiral staircase
	021	INTERIOR FINISH CARPENTRY
120	021-01	Baseboards
121	021-02	Door and window casings

EXHIBIT A - LIST OF SUBCONTRACTS

Reference Number	Subcontract Number	Category / Subcategory
122	021-03	Crown moldings
123	021-04	Chair rails
124	021-05	Architectural details
125	021-06	Closet
126	021-07	Pull down attic ladder
127	021-08	Staircase work
128	021-09	Installation of doors & thresholds
129	021-10	Installation of all hardware
130	021-11	Weather stripping
131	021-12	Screens and screen doors
132	021-13	Shelves in garage
	022	CABINETS
133	022-01	Kitchen cabinets (custom? Lazy Susans etc.)
134	022-02	Bathroom cabinets / linen
135	022-03	Laundry room cabinets
136	022-04	Custom built-ins
137	022-05	Storage in garage
	023	FLOORING
138	023-01	Wood floors
139	023-02	Tile or stone floors
140	023-03	Carpet
141	023-04	Sheet goods
	024	TILE GRANITE STONE
142	024-01	Tile countertops
143	024-02	Granite countertops
144	024-03	Showers & tubs
145	024-04	Decks
146	024-05	Exterior tile/stone
	025	GLAZING
147	025-01	Bathroom mirrors
148	025-02	Wardrobe door/mirrors
149	025-03	Tub and shower enclosures
	026	DECKS
150	026-01	Deck finishes
	027	ARCHITECTURAL DETAILS
151	027-01	Misc. Architectural details
	028	WROUGHT IRON
152	028-01	Interior handrails
153	028-02	Exterior handrails
154	028-03	Gates or fences
155	028-04	Architectural details
156	028-05	Security bars
	029	SPIRAL STAIRCASE
157	029-01	Fabrication, delivery, installation
	030	GARAGE DOORS
158	030-01	Fabrication, delivery, installation
	031	SITE WORK
159	031-01	Concrete flatwork & stairs

EXHIBIT A - LIST OF SUBCONTRACTS

Reference Number	Subcontract Number	Category / Subcategory
160	031-02	Driveway
161	031-03	Finish grading
162	031-04	Masonry hardscapes
	032	
163	032-01	Swimming pool
164	032-02	Spas
165	032-03	Fountains
166	032-04	Irrigation system
167	032-05	Landscape installation
	033	
168	033-01	Irrigation system
169	033-02	Landscape installation
	034	
170	034-01	Interior accessories
171	034-02	Exterior accessories
	035	
172	035-01	Installation of appliances
	036	
173	036-01	Site toilet
174	036-02	Security fence for construction
	037	
175	037-01	Temp erosion control, measures
	038	
176	038-01	Continuous clean-up of site
177	038-02	Final clean-up (interior)
178	038-03	Final clean-up (site)
		CONTINGENCY FOR SEVERE WEATHER CONDITIONS
		CLEAN UP

EXHIBIT B – Example Subcontract

Subcontract :

Category 007

Subcategory 16

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SECTION 8

THE WORK OF THIS SUBCONTRACT

007-16 - INSTALLATION OF DOORS AND WINDOWS

5

This Subcontract of Sub-Category: 16 Of Category: 003 has 1 Section 8s
of which this is the 1 Section 8

8.1 The Subcontractor shall execute the following portion of the Work described in
the Subcontract Documents, including all labor, materials, equipment, services and other
items required to complete such portion of the Work, except to the extent specifically
indicated in the Subcontract Documents to be the responsibility of others:

10 8.2 Scope Of The Work - The Scope of the Work of the subcontract is as follows:

15 The subcontractor shall be responsible for the installation of all
interior and exterior doors and windows, including the installation of
all door and window frames, sills, hinges, knobs, locks latches, view
ports and hardware.

20 A more detailed discussion on the Work is given in Section 8.4 after the exact section of
the Work described above is selected using the location technique of Section 8.3.

If the Subcontractor wishes to comment on the Scope of the Work above, note it here:

25 _____

(Note: Write "none" if applicable)

If there are any Unique Features related to this Subcontract describe them here:

30 _____

(Note : Write "None" if this section is not applicable to any of the description above)
8.3 Location Of Work - The purpose of this subcontract system is to break down the
building project into parts based on a grid, and to arrive at a binding cost estimate for the

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SECTION 8

work to be done within each of these identified parts. The sum of all these parts, of all locations for all trades, shall represent the building project as a whole. **Each sub-contractor** shall go to the drawings, identify exact locations of every part of the building project applicable to his trade, and provide a binding cost estimate for the work encapsulated within each location. The work to be done is described in sections 8.2 and 8.4. The method used to identify each location is as follows:

- All of the drawings have a grid system printed horizontally along the sides-and along the vertical sides of the drawing. "map" grid system is referred to as a "map" grid system 10 with the grid having numbers along the horizontal direction and alphabetical letters along the vertical direction. Therefore, any point on the drawing can be characterized by an ordered pair of a letter description and a number description, for example B,3 would be the "B" height and the number 3 along the horizontal axis. In order to obtain more detail 15 in the horizontal direction further decimal representation is given such as 3.11 which would represent a point at 3.11 . In a similar view it can be seen that D.BB would represent 3.11 in the vertical direction if we had 0 represented by A, I represented by B,2 represented by C,3 represented by D,4 etc. up to 9 represented by J . Hence arbitrary points such as F.BD; 4.25 would represent a point F.BD up, vertical which is 5.13 up 20 and 4.25 along the horizontal. Note: Generally, the views used to describe the location system are the plan view, the section view, and if necessary, the elevation view. Construction details are of course used in conjunction with these drawings to clarify all work to be accomplished.

- It can be seen that if a set of points for a closed contour such as G.BC, 1.06 to G.B.C, 2.17 and then G.BC, 2.17 to C.DE, 2.17 and then C.DE, 2.17 to C.DE, 1.06 and then 25 C.DE, 1.06 to G.BC, 1.06, then this contour identifies some portion of the building project. This enclosed contour together with a companion contour in an orthogonal direction completely defines a fixed box in space that identifies some portion of the project to be built. The contractor is then to prepare a binding cost estimate for all of the 30 work related to his trade within each "box". Based on the above description, it is necessary to select two views from the drawings plus any additional views, sections or notes to clearly and uniquely describe and isolate the area of this subcontract. (Note: Normally, only four coordinates are needed for each contour, therefore "N/A" is entered into the other entries.)

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- 5 In the electronic (network and Website) form of this document, each such contour or "box" is linked between the Drawings, the Contracts and other project documents by a "clickable" icon shown next to the contour description below. Click icon to open view menu for box (e.g., overlay/drawing view).

The first contour locations	Box 1	are on Drawing Number	A-8	at location
	coordinates	AFA 545	to	DFA 545
 007-16-08-01	then	DFA 545	to	DFA 475
	then	DFA 475	to	AFA 475
	then	AFA 475	to	AFA 545
then, as needed to describe, also:	N/A			

The next contour locations	Box 2	are on Drawing Number	A-8	at location
	coordinates	BAA 460	to	CAA 460
 007-16-08-02	then	CAA 460	to	CAA 400
	then	CAA 400	to	BAA 400
	then	BAA 400	to	BAA 460
then, as needed to describe, also:	N/A			

The next contour locations	Box 3	are on Drawing Number	A-8	at location
	coordinates	CCF 460	to	DFA 460
 007-16-08-03	then	DFA 460	to	DFA 433
	then	DFA 433	to	CCF 433
	then	CCF 433	to	CCF 460
then, as needed to describe, also:	N/A			

10 The next contour locations	Box 4	are on Drawing Number	A-8	at location
	coordinates	BAA 390	to	CAA 390
 007-16-08-04	then	CAA 390	to	CAA 330
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then CAA 330 to BAA 330
Then BAA 330 to BAA 390

then, as needed to describe, also:

N/A

The next contour locations Box 5 are on Drawing Number A-8 at location
coordinates CCF 390 to DFA 390
 007-16-08-05
then DFA 390 to DFA 330
then DFA 330 to CCF 330
then CCF 330 to CCF 390

then, as needed to describe, also:

N/A

The next contour locations Box 6 are on Drawing Number A-8 at location
coordinates GCF 545 to HJA 545
 007-16-08-06
then HJA 545 to HJA 475
then HJA 475 to GCF 475
then GCF 475 to GCF 545

then, as needed to describe, also:

N/A

The next contour locations Box 7 are on Drawing Number A-8 at location
coordinates GCF 460 to HJA 460
 007-16-08-07
then HJA 460 to HJA 400
then HJA 400 to GCF 400
then GCF 400 to GCF 460

then, as needed to describe, also:

N/A

The next contour locations Box 8 are on Drawing Number A-8 at location
coordinates HDA 390 to HJA 390
 007-16-08-08
then HJA 390 to HJA 330
then HJA 330 to HDA 330
then HDA 330 to HDA 390

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then, as needed to describe, also:

N/A

The next contour locations Box 9 are on Drawing Number A-8 at location coordinates ICA 390 to IFF 390
then IFF 390 to IFF 330
then IFF 330 to IFF 390
then IFF 390 to ICA 390

then, as needed to describe, also:

N/A

Additional location details - if the subcontractor feels the need to more clearly define the location of the work, encapsulated in the "box", or to identify areas outside the box that are interconnected with the work inside the box, reference to these concerns should be noted here:

- 5 _____
- 10 8.4 Work Description - Using the method in section 8.3 the Contractor has now defined an area within which the work described in section 8.2 is to be performed. It is understood that once the contours given in section 8.3 are determined dim each and every element of the work contained in that location can be identified and costed. This work is to be accomplished according to the conditions set forth in section 8.7.
- 15 It is also understood that there is the possibility that identified locations may be interconnected with locations and tasks identified by other subcontracts, and in some locations more than one section 8 must be bid together for a complete description of the work. If this contract is valid only if associated subcontracts or associated section 8's of the sub-contracts are awarded together then they should be listed here:
- 20 Associated Section 8's: _____ Associated Subcontracts: _____
(Note: If no associated section 8s or associated subcontracts are needed for this contract to be valid, then mark "None" in each of the above blanks.)

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CLAIMS

1. A method of topologically subdividing the project work information included in construction project plans and linking said subdivided plan information to at least one plurality of construction project contracts and/or contracts, to enhance the precision, clarity, specificity and completeness of both said plans and said subcontracts, said plans including at least one plan sheet, comprising the following steps in any operative order:
 - 5 (a) defining a plurality of topological subdivision regions of said at least one plan sheet, each of said plurality of subdivision regions characterizing a selected portion of the scope of work defined by said plans;
 - 10 (b) linking each of said plurality of subdivision regions to one of a plurality of said contracts;
 - (c) incorporating said linked region into said contract to define a portion of the scope of work to be performed under said contract.
- 15 2. A method of subdividing and linking as in claim 1, wherein said topological subdivision defining step includes:
 - (a) inputting said at least one plan sheet as electronic data to a computer data processing system including a computer-readable memory device;
 - 20 (b) storing said input plan sheet data as a file in computer-readable memory device;
 - (c) inputting data to said computer data processing system to define at least one of said plurality of subdivision regions of said at least one plan sheet, said subdivision region of said plan sheet characterizing a selected portion of the project work defined by said plans; said portion of said project work corresponding to the work to be performed under a particular one of said contracts; and
 - 25 (d) storing said definition of said at least one subdivision region as data in computer-readable memory device.
- 30 3. A method of subdividing and linking as in claim 2, further including:
 - (a) the step of providing in said computer-readable memory a table defining a plurality of project subcontract work categories, each of said work categories

corresponding to the work to be preformed under one of said plurality of subcontracts; and

- (b) the step of linking in said computer-readable memory said at least one subdivision region with a selected one of said work categories, so as to create a data structure correlating said at least one subdivision region with said selected work category.
- 5

4. A method of subdividing and linking as in claim 3, further including:

- (a) the step of providing in said computer-readable memory at least one subcontract document file;
- (b) the step of linking in said computer-readable memory at least said selected work category, thereby including in said data structure a correlation between said selected work category and said subcontract document file, and thereby including in said data structure a correlation between said at least one plan sheet subdivision region and said subcontract document file, so as to characterize a selected portion of said project work to be performed under said subcontract.
- 10
- 15

5. A method of subdividing and linking as in claim 4, further including:

- (a) the step associating in computer readable memory a selected icon file with said at least one subdivision region and said at least one plan sheet;
- (b) the step of displaying an image of said selected subcontract document on a display device connected to said computer system, said computer system including a graphical user interface;
- (c) the step of displaying said selected icon as an image superimposed upon said subcontract image; and
- (d) the step of displaying an image of said subdivision region superimposed upon said plan sheet in response to a selection of said icon using said graphic user interface, so as to characterize at least a portion of the work to be performed under said subcontract by plan information included in said subdivision and plan sheet images.
- 20
- 25

30

6. A method of subdividing and linking as in claim 4, further including:

- (a) the step associating an index reference with said at least one subdivision region and said at least one plan sheet;

- (b) the step of printing said selected subcontract document with said index reference included in said subcontract document; and
- (d) the step of printing an image of said indexed subdivision region superimposed upon said plan sheet, so as to characterize at least a portion of the work to be performed
- 5 under said subcontract by plan information included in said subdivision and plan sheet images.

7. A method of subdividing and linking as in claim 4, wherein said subdivision defining step includes:
- 10 (a) defining at least one closed boundary curve coordinated with said plan sheet, said subdivision region comprising the plan area enclosed by said boundary.

8. A method of subdividing and linking as in claim 4, wherein said subdivision defining step includes:
- 15 (a) defining at least one trace path upon said at least one plan sheet, said trace path delimiting a trace area of said plan sheet lying within a predetermined distance from said path, said subdivision region comprising said trace area.

9. A method of subdividing and linking as in claim 4, wherein said subdivision defining step includes:
- 20 (a) defining at least one center point upon said at least one plan sheet, said center point delimiting an area of said plan sheet lying within a predetermined geometric boundary shape coordinate with said center point., said subdivision region comprising the plan area enclosed by said predetermined boundary shape.

- 25
10. A method of subdividing and linking as in claim 4, wherein said subdivision defining step includes:
- (a) defining a reference grid coordinate with said plan sheet, said grid dividing said sheet into a plurality of predefined sub-areas; and
- 30 (b) selecting one or more contiguous ones of said plurality of sub-areas, said subdivision region comprising said selected contiguous sub-areas.

11. A method of inter-linking as in claim 1, wherein said linking and incorporation is performed electronically and is remotely accessible via an Internet web-server, said plans and said subcontracts being stored in electronic form for rendering and display via said web-server.

5

12. A computer data processing system for inter-linking construction project plans to bidding contracts to enhance the precision, clarity and completeness of both said plans and said contracts, wherein the scope of work of said project is defined by said plans, said plans comprising at least one sheet, and wherein said project work is bid by means of said bidding contracts, each of said bidding contracts including an agreement to perform specified portions of said project work, said data processing system comprising:

10 (a) a computer-readable memory means for storing at least one plan file including digital image information of said plan sheets;

15 (b) a computer display means connected to said memory means for displaying said plan sheet image;

(c) a computer-operator interface means for inputting information to specify a closed boundary on said plan sheet image to define at least one subdivision region of said plan sheet image, said subdivision region corresponding to a portion of the project work defined by said plans;

20 (d) a computer processing means connected to said memory means for storing said boundary specifying information.

(e) linking means connected to said memory means for linking said stored plan image and said stored boundary information to at least one bidding contract, so as to define a portion of the project work to be performed under said contract.

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13. A computer data processing system, as in claim 12 which includes a computer program including code for causing said computer system to be accessible by at least one remote user via the Internet.

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14. A computer program product for the inter-linking of construction project plans to bidding contracts to enhance the precision, clarity and completeness of both said plans and said contracts, wherein:

(i) the scope of work of said project is defined by said plans comprising at least one plan sheet;

(ii) said project is bid by means of said bidding contracts, each of said bidding contracts including an agreement to perform specified portions of the scope of project work; and

(iii) said computer program product is for operating on a computer system including processor means, memory means, display means and operator input means;

said computer program product comprising a computer usable medium having computer readable program code means embodied in said medium, said computer readable program code comprising:

(a) a first program code means for causing said computer system to read a file stored in said memory means, said file including an image of at least one of said plan sheets;

(b) a second program code means for causing said computer system to display said plan sheet image;

(c) a third program code means for causing said computer system to input operator-specified information to define a boundary around at least one subdivision region of said plan sheet image, said subdivision region corresponding to a portion of the project work defined by said plans;

(d) a fourth program code means for causing said computer system to store said boundary-defining information in said memory means;

(e) a fifth program code means for causing said computer system to link said stored plan image and said stored boundary information to at least one bidding contract, so as to said define a portion of the project work to be performed under said contract.

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15. A computer program product as in claim 14, wherein said product includes a sixth program code means for causing said computer system be accessible by at least one remote user via the Internet, said access of said remote user permitting said user to control the execution of at least one of said first through fifth program code means.

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16. An electronic business method for construction contract bid and construction management control comprising:

- a) a website, including at least one of design services, inter-linking of construction project plans for bidding contracts, builder control, and affiliate links;
 - b) a website operation for providing said services to user-subscribers, including input of operator-specific information response to user requests and information and communications to users; and
 - c) a computer data processing system for said interlinking and website operation.
- 10 17. An electronic business method as in claim 1 wherein;
a) said links include hyperlinks to affiliates providing services under referral or commission fee basis aid affiliate including at least one of owner, developer, architects, contractors, engineers, Surveyors, subcontractors, lenders, insurers, accounting, service providers, legal service providers, and title services.
- 15 18. An electronic business method as in claim 17 wherein;
a) said operator interactively provides said inter linking services at least one user subscriber including owners, developers, architects, contractors, and subcontractors.
- 20 19. An electronic business method as in claim 18 wherein;
a) said website includes an operator-managed secure project page accessible through said website for interactive display and rendering of linked plans and contracts, and exchange of e-mail information related to the project plan, bidding and construction phases of a particular project.
- 25 20. An electronic business method as in claim 16 wherein interaction between and among users and said operator is browser and e-mailed enabled.

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ABSTRACT

The present invention relates to a system and method ("Bid System") for topologically subdividing and defining the detail scope of work and for inter-linking construction plans and specifications to construction contracts and subcontracts. The Bid System permits full, clear and unambiguous definition of the scope of work under each subcontract, so as to eliminates errors and uncertainty relating to contract performance. The Bid System establishes a series of electronic overlays to the digitized construction plans corresponding to different trades or categories of work, in which each overlay may be divided into a series of optimized topological subdivisions or "boxes" which uniquely identify and locate on the plans a portion of the work to be performed. The system includes linkage of the overlays and boxes to the subcontracts whereby the scope of work to be bid is accurately associated or "mapped" to corresponding regions and overlay category on the architectural drawings or construction plans. This mapping of overlays to plans constitutes a system of almost-orthogonal equations having the property of progressively increasing transparency as the typical size of the subdivisions is reduced. The system and method also permits a bi-directional flow of information from the various entities involved in the bid process so as to enhance the clarity and detail of work description of both the contracts and the plans and specifications, thus permitting more efficient and effective monitoring and management of contract performance. Internet-based embodiments of the Bid System of the invention are described, including a central-server remote host Internet embodiment in which the transmittal of data, including plans, overlays, contracts, bids, comments, edits, changes and the like are via the Internet, the Bid System being operated principally on a central remote host operated by a Bid System Service Provider (BSSP). Distributed host Internet embodiments are also disclosed.

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DISCRETE OPTIMIZATION

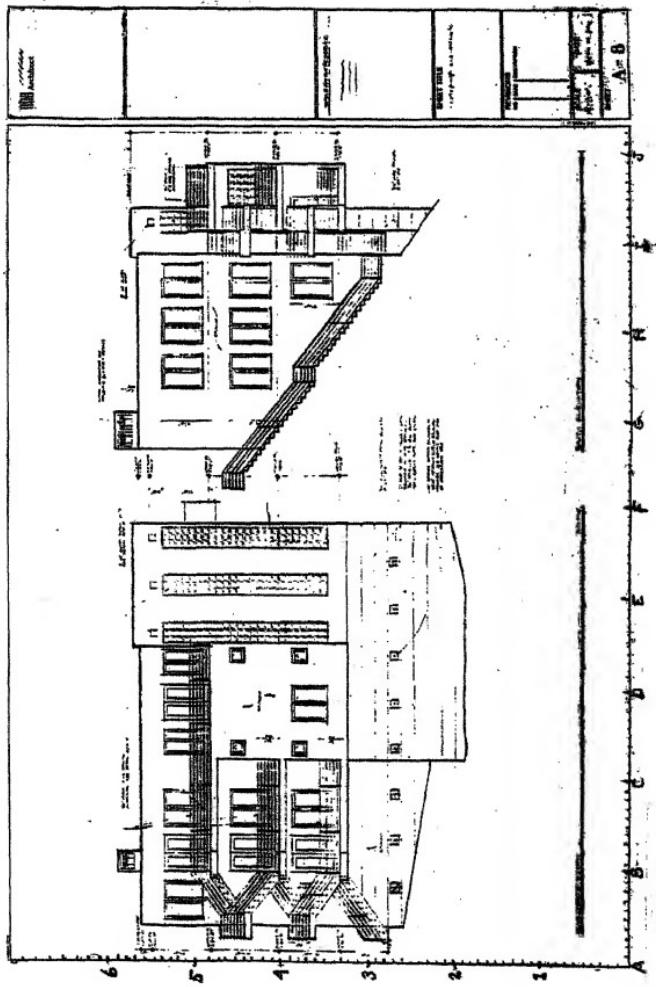


Fig. 1

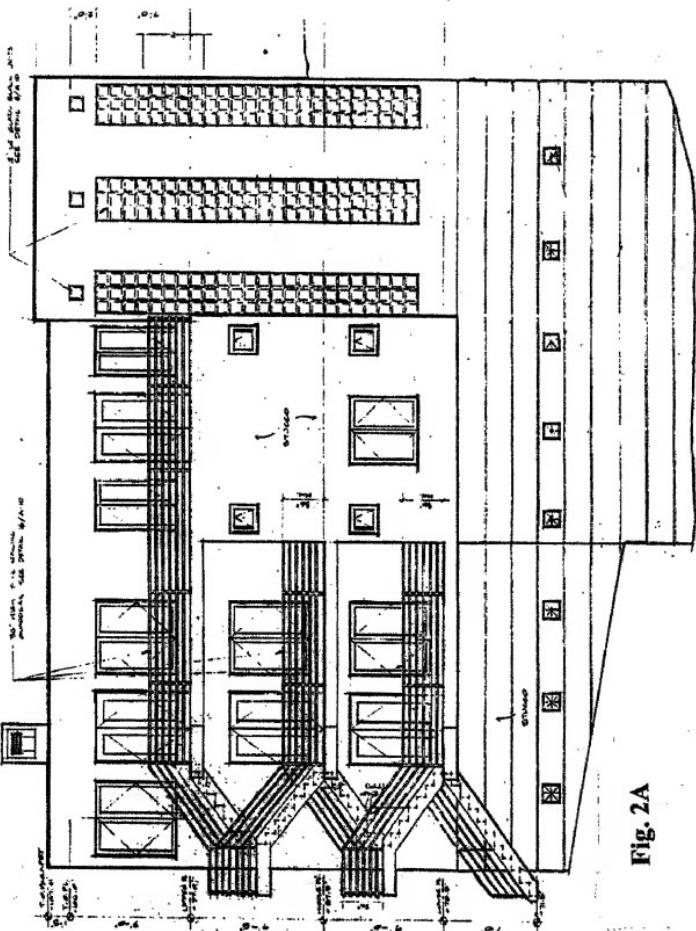
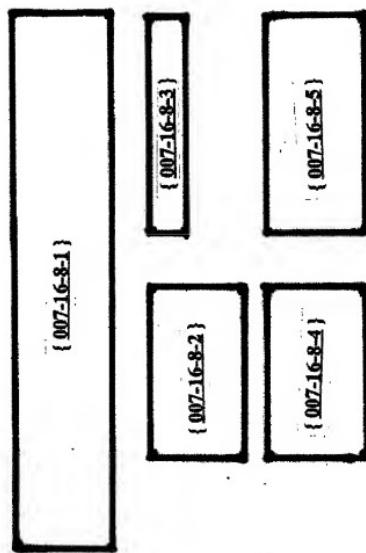


Fig. 2A

Fig. 2B



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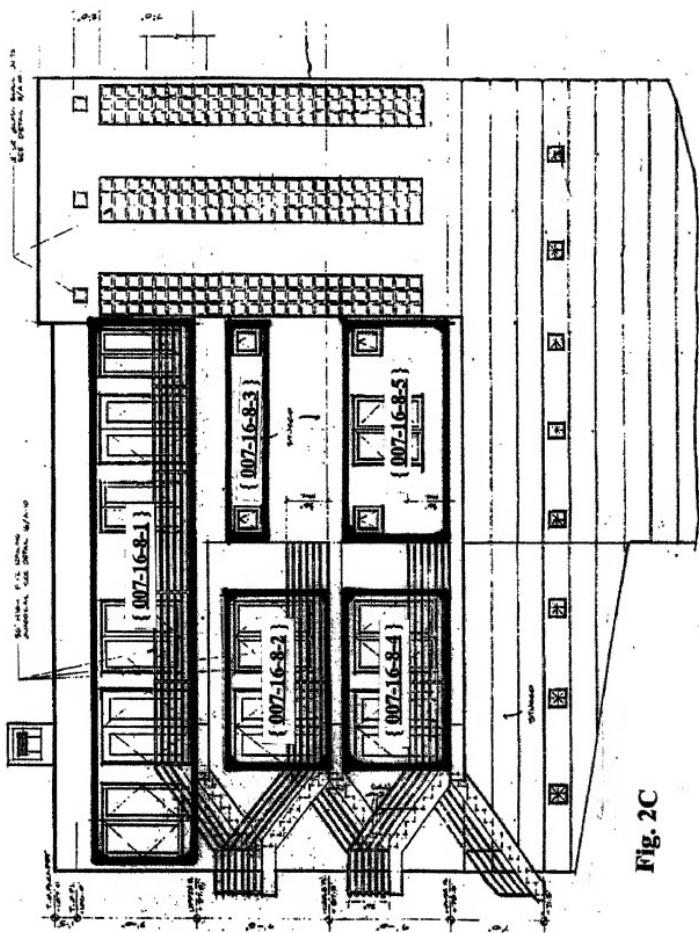
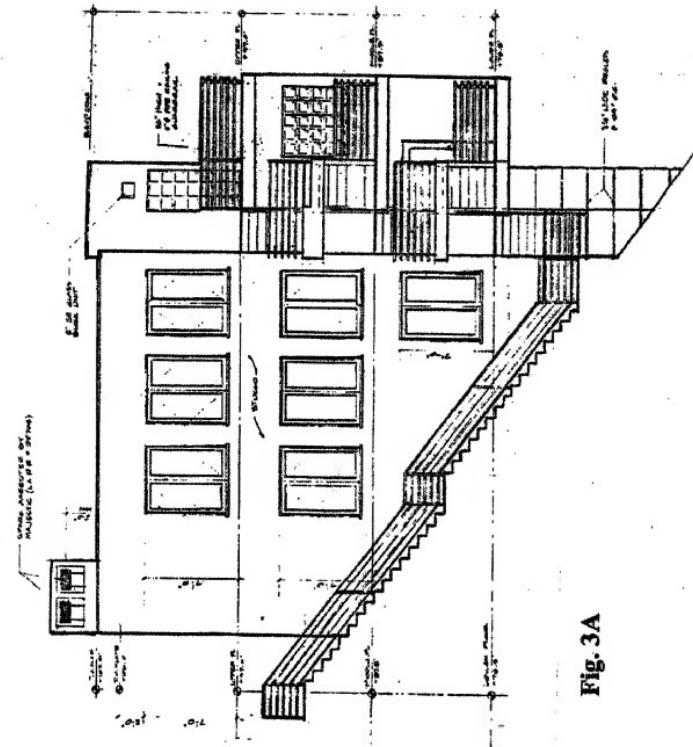


Fig. 2C



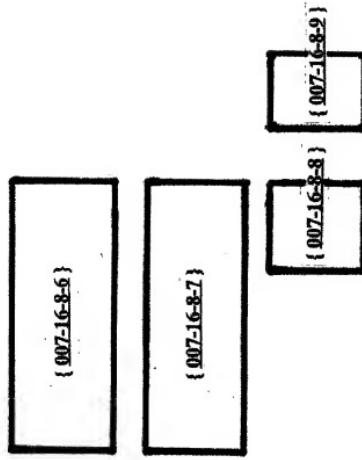


Fig. 3B

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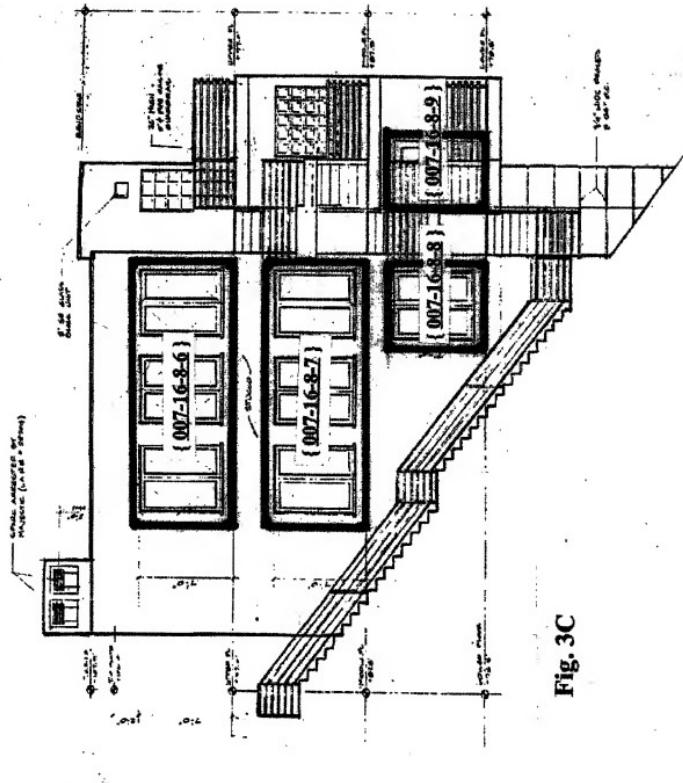


Fig. 3C

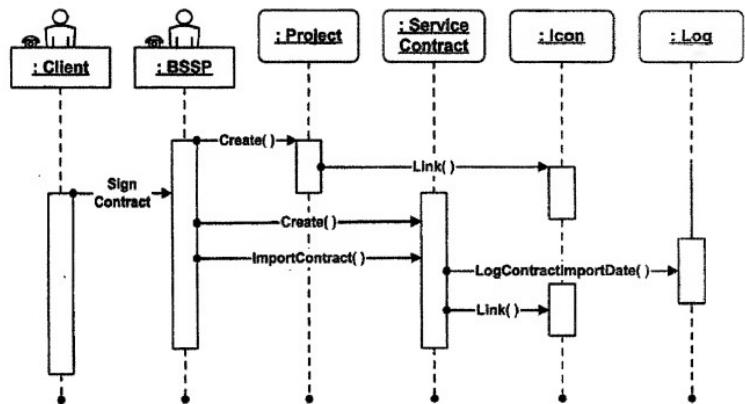


Figure 4

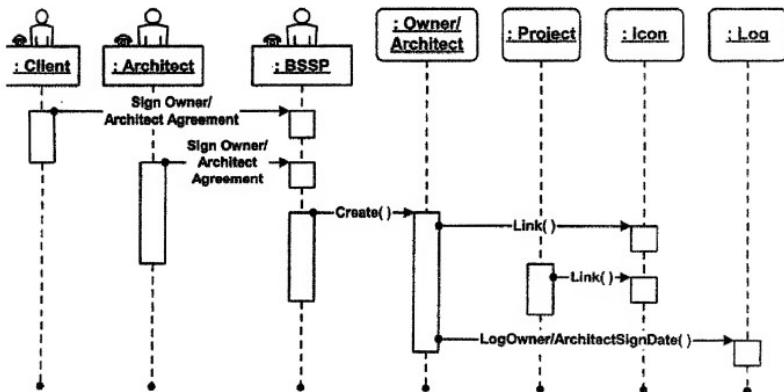


Figure 5

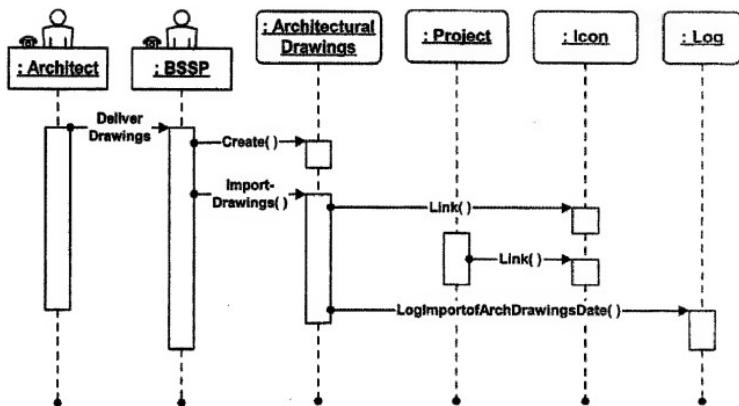


Figure 6

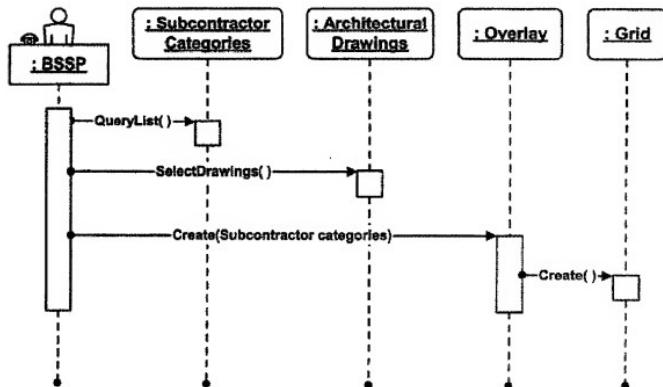


Figure 7

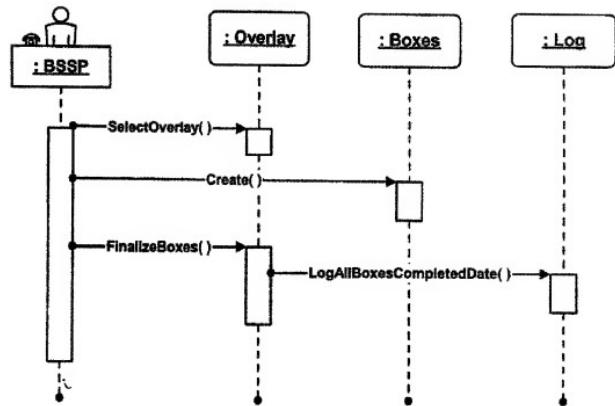


Figure 8

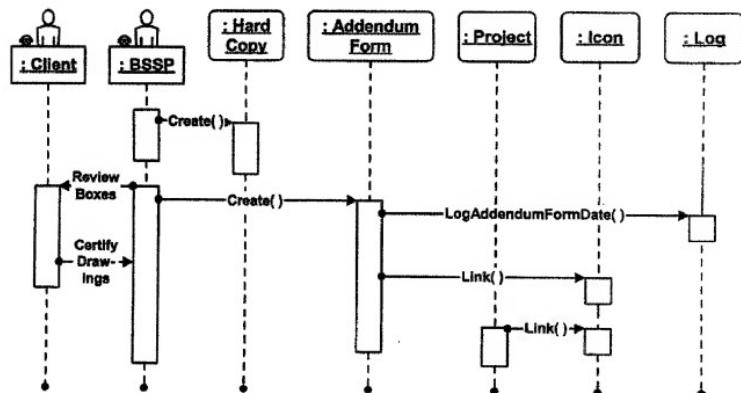


Figure 9

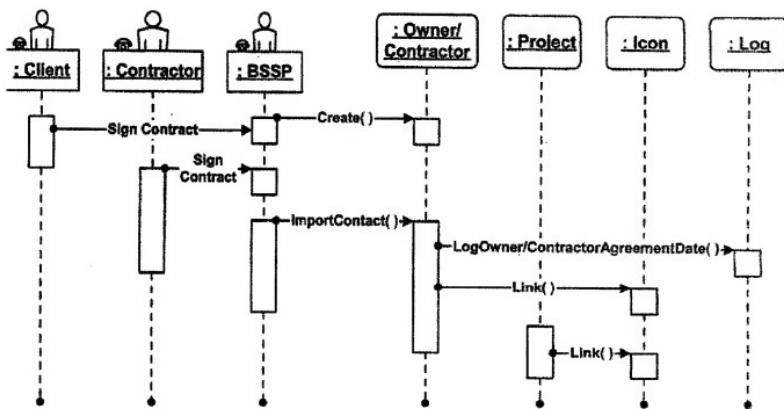


Figure 10

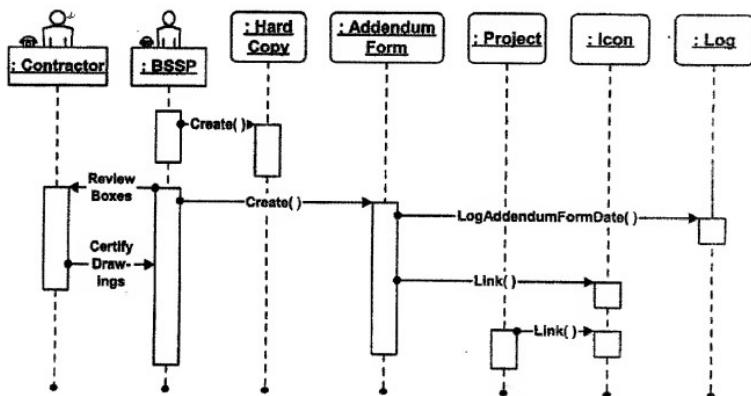


Figure 11

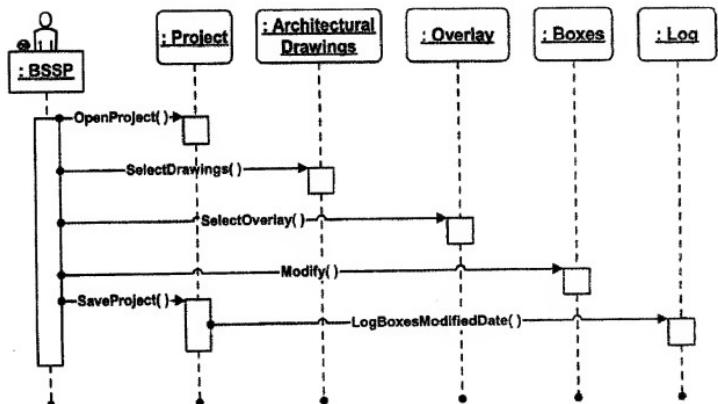


Figure 12

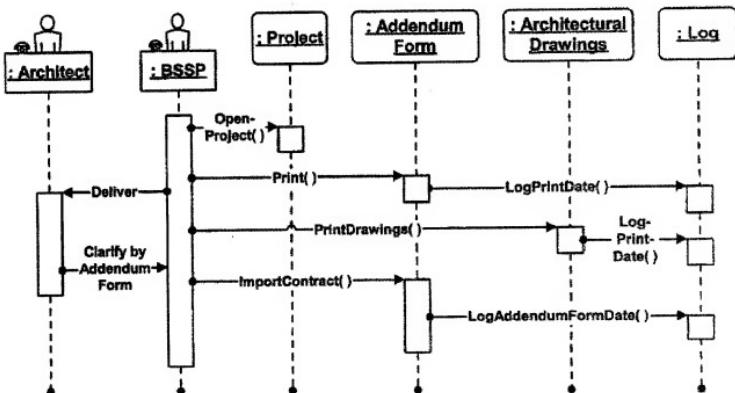


Figure 13

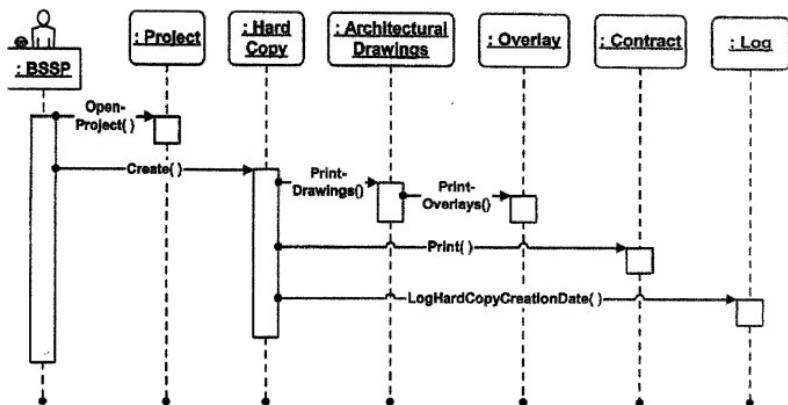


Figure 14

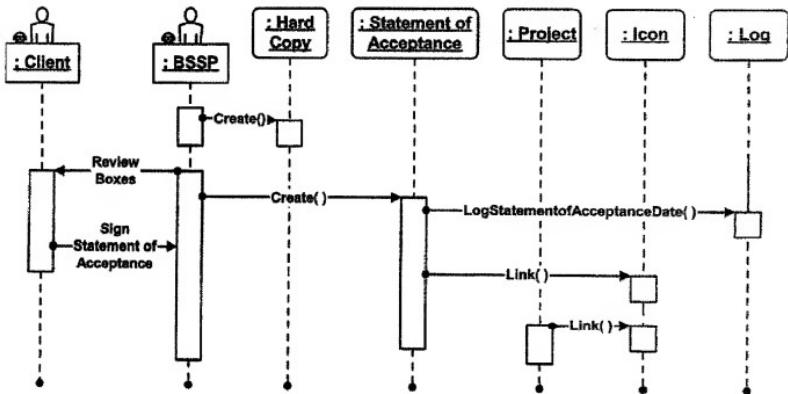


Figure 15

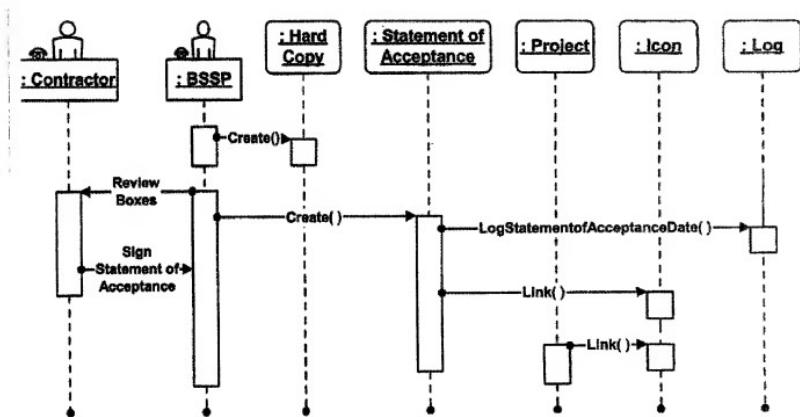


Figure 16

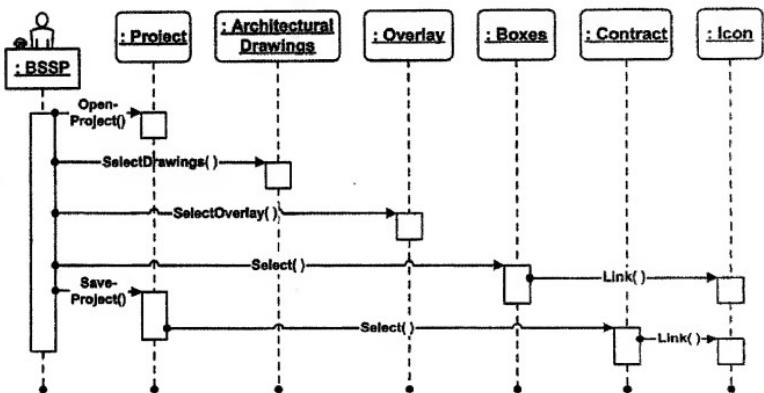


Figure 17

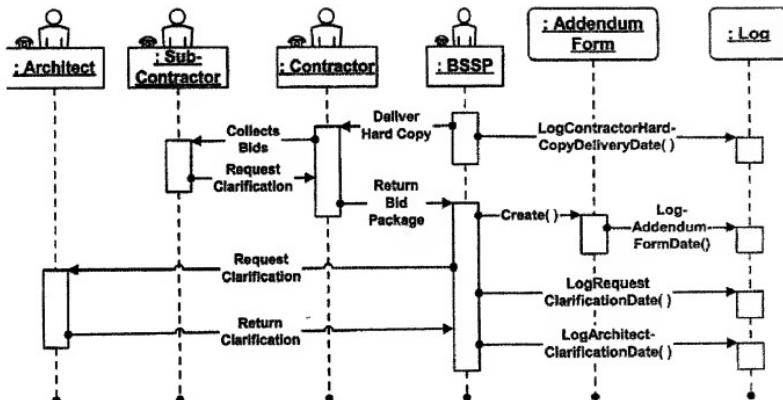


Figure 18

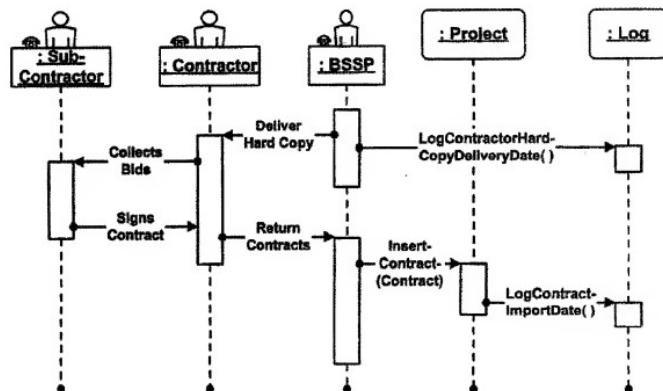


Figure 19

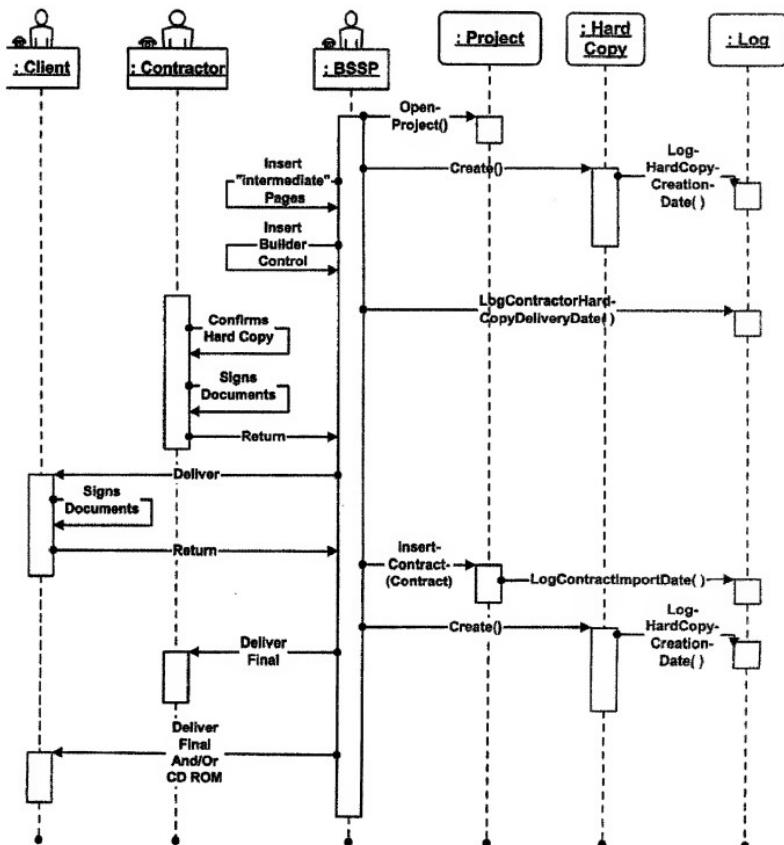


Figure 20

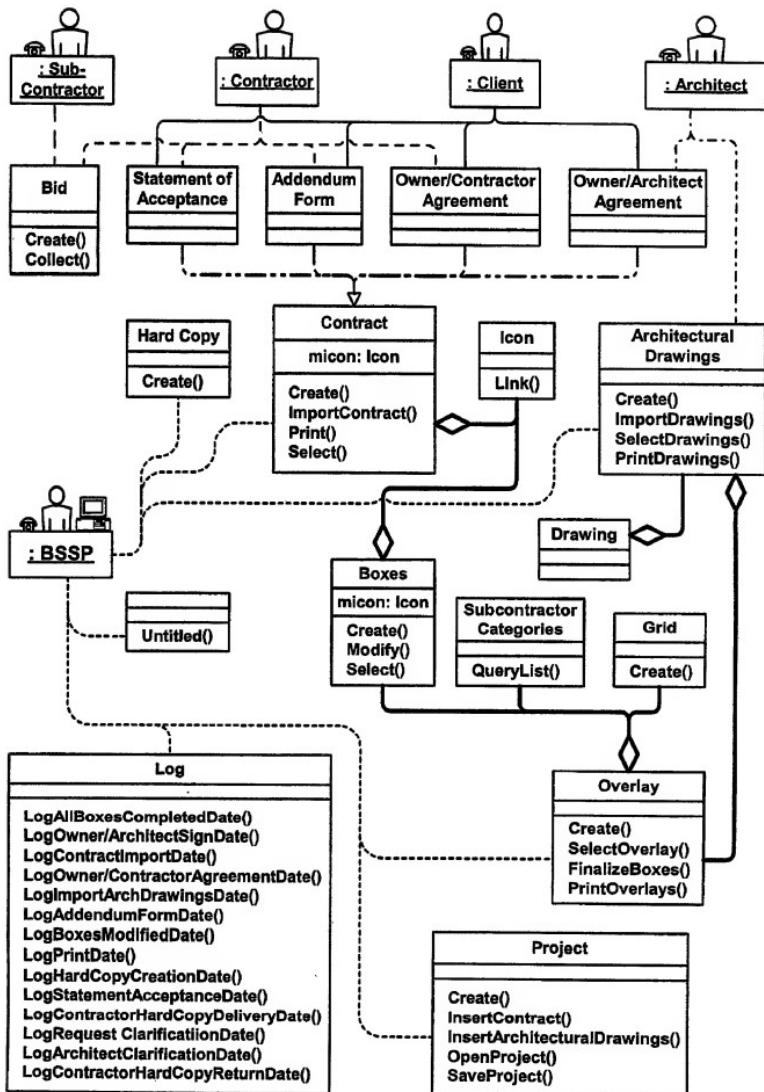


Figure 21

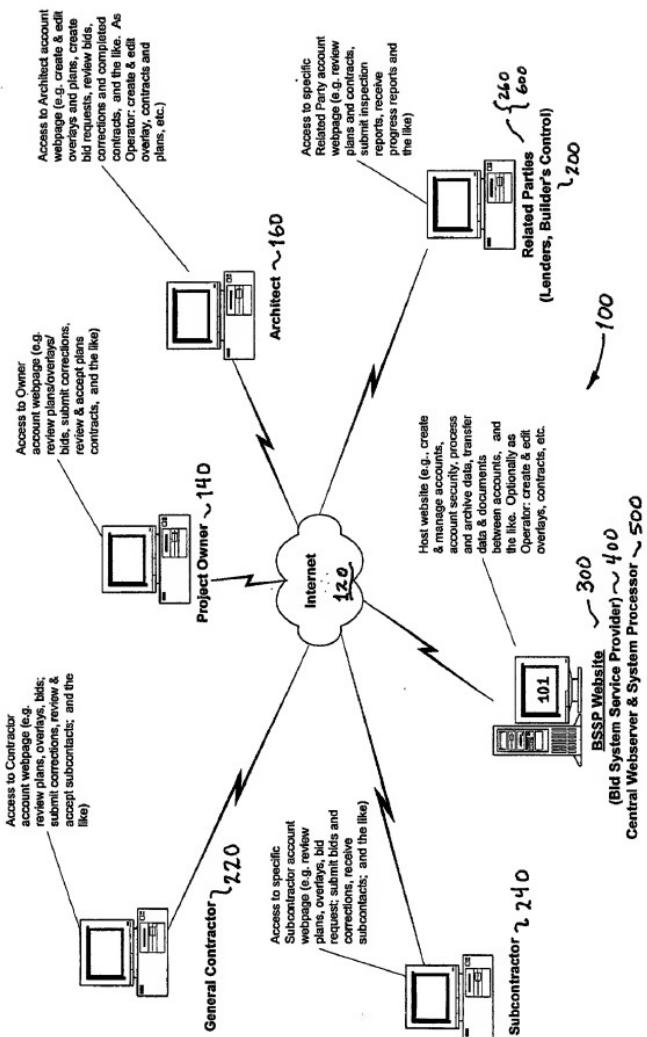


Figure 22 - Internet-Based Bid System

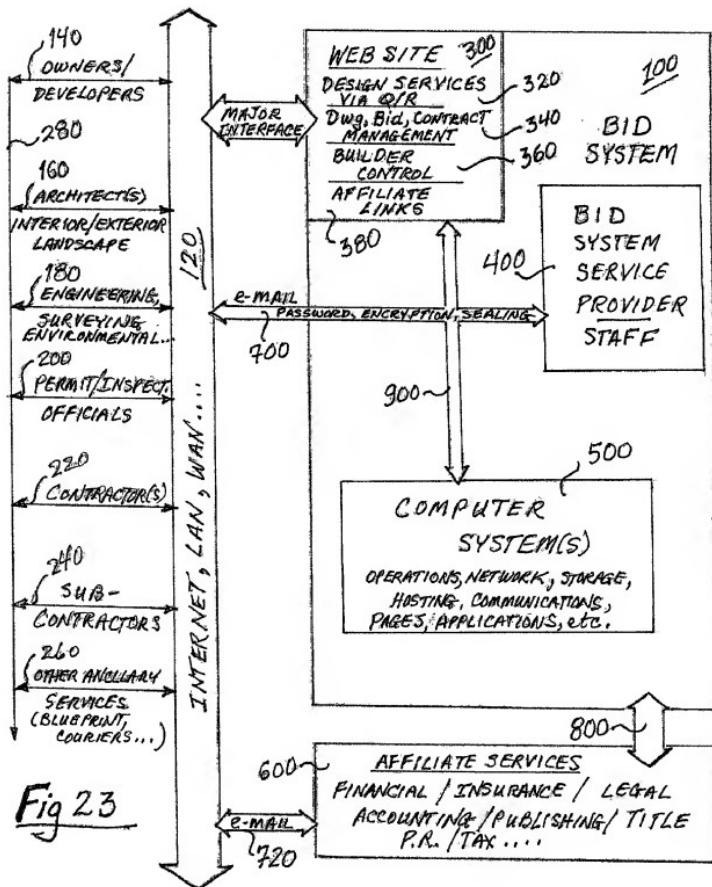


Fig 2.3

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